

## Atlantic Canada Tourism Partnership



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Confidential

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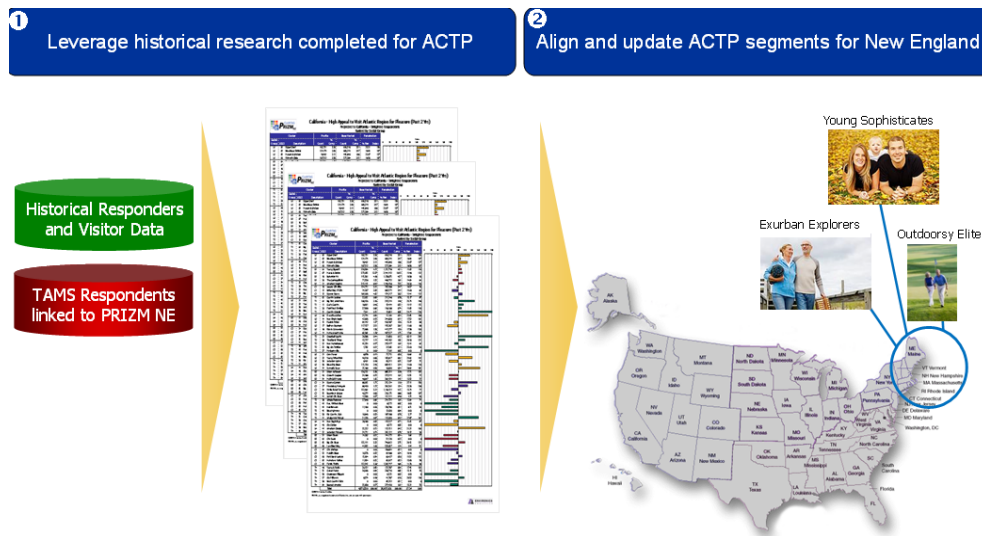


## Background

Atlantic Canada Tourism Partnership (ACTP) has made a decision to re-enter the New England market on a test basis. ACTP has commissioned Environics Analytics to help them identify efficient and cost effective ways to reach their target market using lifestyle segmentation. The following study leverages research from historical segmentation analysis that had been completed for ACTP and applies it to the New England market.

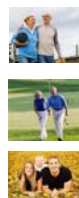
## Methodology

Environics Analytics leveraged historical research using TAMS, visitor and inquirer data to create custom lifestyle segments for ACTP. Data was projected to the New England market to identify relevant lifestyle segments. Careful attention was taken to preserve existing custom segments while capturing the nuances of the New England market.



## Results

The study concluded that three of the four lifestyle segments identified in the Mid Atlantic study were relevant in the New England market. These segments, although similar in nature to the Mid Atlantic segments, capture region-specific data and nuances associated with the New England market. They include the:



Exurban Explorers (1,142,229 Households)

Outdoorsy Elite (1,006,160 Households)

Young Sophisticates (444,491 Households)

The largest group is Exurban Explorers followed by Outdoorsy Elite and Young Sophisticates. Together these three groups represent 46% of the total households in New England. Each segment has been briefly described to assist with allocation of ACTP’s marketing dollars in New England.

## Exurban Explorers

Exurban Explorers in New England	#	%
Target Households	1,142,229	21.7
Target Pop 18+	2,464,045	22.0



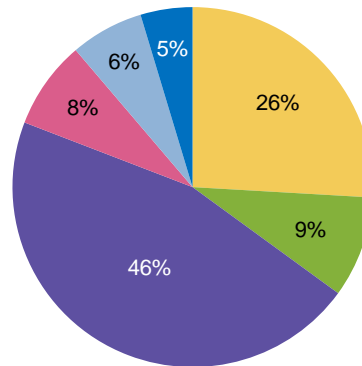
### Key Demographics

- Singles and couples between 55 and 75 yrs plus, living in small households
- Children are grown and no longer live in the household
- High educational attainment; bachelor’s and post graduate degree
- High proportion of unemployed (47% above avg), those in the workforce have management, business and financial careers
- Moderate income; \$50K - \$75K (60% above avg), \$75K - \$100K (53% above avg), \$100K-\$150K (41% above avg)
- Majority are white (13% above avg)

### Geographic Distribution

#### Distribution by State in New England

- In the New England market, 46% of Exurban Explorer households are found in Massachusetts and 26% are found in Connecticut
- Almost half of the group can be found in Boston representing one in five households.
- Within Connecticut, 1 in 4 households in Hartford & New Haven are target households (14% above average)



- Connecticut
- Maine
- Massachusetts
- New Hampshire
- Rhode Island
- Vermont

#### Distribution by Designated Market Areas (DMAs) in New England (Top Markets)

Name	Target Group		Market		Penetration	
	# of HHds	% of TG	# of HHds	% of Mkt	% Pen	Index
Boston, MA	517,400	45.30	2,435,821	46.25	21.24	98
Hartford & New Haven, CT	251,334	22.00	1,019,419	19.36	24.65	114
Providence, RI	118,117	10.34	621,836	11.81	18.99	88
Portland-Auburn, ME	101,555	8.89	411,491	7.81	24.68	114
Burlington, VT	65,640	5.75	335,905	6.38	19.54	90
Springfield-Holyoke, MA	64,575	5.65	265,496	5.04	24.32	112
Bangor, ME	21,715	1.90	145,160	2.76	14.96	69
Presque Isle, ME	1,893	0.17	31,241	0.59	6.06	28
<b>Legend</b>	Low Index (I<80)			High Index (I>120)		

(For complete list of DMA’s see appendices)

## Exurban Explorers

### Mindset – Social Values (Source Environics Research) \*

Strong Attitudes	
Introspection & Empathy	138
Confidence in Big Business	132
Entrepreneurialism	129
Just Deserts	128
Community Involvement	127
Ecological Fatalism	127

Weak Attitudes	
Rejection of Order	87
American Entitlement	86
Sensualism	86
National Pride	85
Religiosity	84
Fear of Violence	72



**Keeping the Dream Alive:** The entrepreneurial spirit of this group motivates them to take the required steps to becoming self-employed and being in control of all facets of their professional and personal life

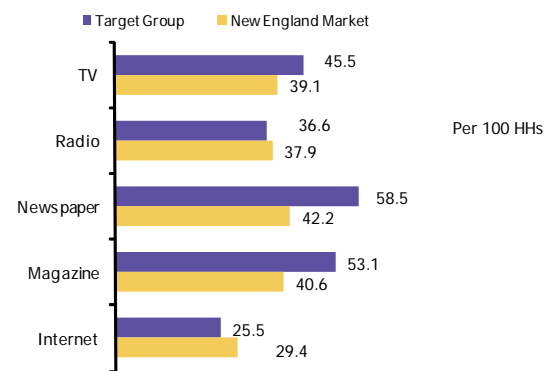
**Open and Interested:** These open-minded travelers are interested in diverse cultures, destinations and experiences and have a desire to learn more about them. They seek out mystery, romanticism and adventure in an attempt to surround themselves with beauty and pleasure

**Fairness:** The Exurban Explorers have an interest in understanding life rather than taking sides and put their confidence in receiving good quality and service from organizations and well known products

### Media Habits (Source: Simmons)

- **TV:** Heavy viewers, strong for all day viewing; best formats: early evening news and primetime news/documentaries. Best channels: American Movie Classics, A&E, BBCAmerica, CNN, ESPN, Golf and Hallmark channels
- **Radio:** Heavy during mid day, typically stations include all news, classical, easy listening, golden oldies and jazz
- **Newspapers:** Heavy readers of daily newspapers; read all sections at above rates, except for classifieds
- **Magazines:** Heavy readers of magazines; best formats are travel, special appeal and science/technology titles
- **Online:** Weak users, this group ranks average for owning a computer, those who do use the internet use it for financial and stock activity as well as medical services and information

### Media Usage:



\*TV, Radio Measure "All Day Quintile 1" Magazine, Newspaper Measures "Quintile 1", Internet Measures "Internet Active at Home/Work, Quintile 1"

\*For a complete list of SV and descriptions see appendix

## Outdoorsy Elite

Outdoorsy Elite in New England	#	%
Target Households	1,006,160	19.1
Target Pop 18+	2,215,686	19.8



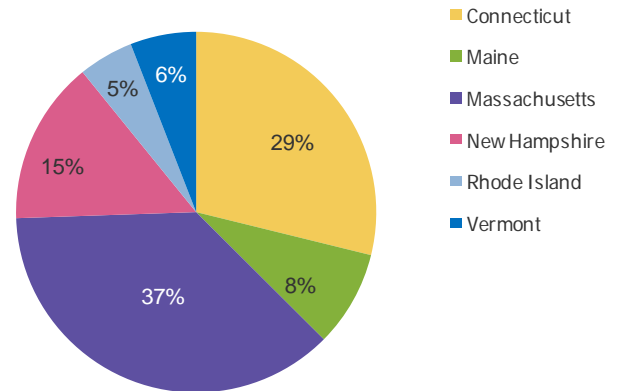
### Key Demographics

- Married couples aged 45-54 yrs living in small households
- Where children are present they are 18 yrs and older
- High educational attainment; bachelor’s and post graduate degree
- Work full time in professional careers in management, computer/mathematical, health practitioner/technician and sales related occupations
- High income; \$100K - \$150K (88% above avg), \$150K - \$200K (2x the avg), over \$200K (82% above avg)
- Majority are white (10% above avg)

### Geographic Distribution

#### Distribution by State in New England

- Massachusetts and Connecticut have the highest concentration of the Outdoorsy Elite target segment in New England
- Vermont has a lower concentration of the target segment (6%), however Burlington, VT has a high penetration 25% and ranks 34% above the average



#### Distribution by Designated Market Areas (DMAs) in New England (Top Markets)

Name	Target Group		Market		Penetration	
	# of HHds	% of TG	# of HHds	% of Mkt	% Pen	Index
Boston, MA	450,341	44.76	2,435,821	46.25	18.49	97
Hartford & New Haven, CT	240,645	23.92	1,019,419	19.36	23.61	124
Providence, RI	86,268	8.57	621,836	11.81	13.87	73
Burlington, VT	85,977	8.55	335,905	6.38	25.60	134
Portland-Auburn, ME	80,277	7.98	411,491	7.81	19.51	102
Springfield-Holyoke, MA	45,437	4.52	265,496	5.04	17.11	90
Bangor, ME	16,345	1.62	145,160	2.76	11.26	59
Presque Isle, ME	870	0.09	31,241	0.59	2.78	15
<b>Legend</b>	Low Index (I<80)			High Index (I>120)		

(For complete list of DMA’s see appendices)

## Outdoorsy Elite

**Mindset – Social Values** (Source Environics Research) \*

Strong Attitudes	
Personal Control	135
Duty	127
Ecological Concern	125
Rejection of Order	123
Social Intimacy	123
Financial Security	123

Weak Attitudes	
Sexual Permissiveness	74
Fear of Violence	73
Acceptance of Violence	72
Status via Home	72
Confidence in Big Business	69
Just Deserts	69



**Security and Duty:** This well established group has a feeling of security and optimism regarding their financial future. They put duties and obligations above their own personal pleasures and interests

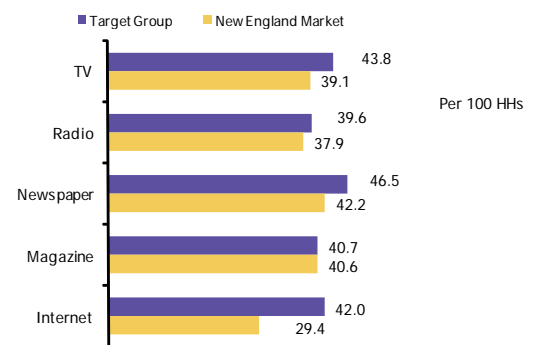
**In control:** The Outdoorsy Elite have paid their dues and are now in control of their future. They strive to organize and control the direction of their lives.

**Intimate:** When socializing this group prefers the familiarity and comfort of surrounding themselves with smaller, closely knit groups of people

### Media Habits (Source Simmons)

- **TV:** Moderate viewers; best formats: evening animation, primetime general dramas and sitcoms. Best channels: A&E, Bravo, Comedy Central, Country Music channel, Discovery channel, ESPN
- **Radio:** Moderate all day listening and heavy drive time, typically stations include adult & hot adult contemporary, all news & all sports, classic rock, country and golden oldies
- **Newspapers:** Heavy readers of daily newspapers; read the classifieds, front page, general news and sports sections
- **Magazines:** Heavy readers of magazines; best formats are sports, travel and women fashion
- **Online:** Heavy users, this group uses the internet for a variety of uses, from banking to shopping to reading online magazines and newspapers

### Media Usage:



\*TV, Radio Measure "All Day Quintile 1" Magazine, Newspaper Measures "Quintile 1", Internet Measures "Internet Active at Home/Work, Quintile 1"

## Young Sophisticates

Young Sophisticates in New England	#	%
Target Households	444,491	8.4
Target Pop 18+	930,376	8.3



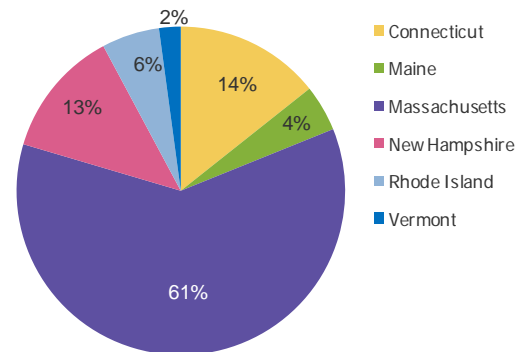
### Key Demographics

- Families; maintainers commonly 25-44 years old
- Their children are young, typically school age
- High educational attainment; bachelor’s and post graduate degree
- White collar professionals working in management, sales related and production occupations
- Moderate income; \$50K - \$75K (75% above avg), \$75K - \$100K (55% above avg), \$100K-\$150K (50% above avg)
- Predominantly white but with a high proportion of Hispanics

### Geographic Distribution

#### Distribution by State in New England

- At 61%, Massachusetts has the highest concentration of Young Sophisticates in the New England market
- Boston, MA is strong proportionally (38% above average) and has the greatest number of Young Sophisticates (64% of target group). However since Boston is so large this only represents one in ten households



#### Distribution by Designated Market Areas (DMAs) in New England

Name	Target Group		Market		Penetration	
	# of HHds	% of TG	# of HHds	% of Mkt	% Pen	Index
Boston, MA	284,489	64.00	2,435,821	46.25	11.68	138
Hartford & New Haven, CT	59,337	13.35	1,019,419	19.36	5.82	69
Providence, RI	53,026	11.93	621,836	11.81	8.53	101
Portland-Auburn, ME	18,914	4.26	411,491	7.81	4.60	54
Springfield-Holyoke, MA	16,435	3.70	265,496	5.04	6.19	73
Burlington, VT	10,769	2.42	335,905	6.38	3.21	38
Bangor, ME	1,521	0.34	145,160	2.76	1.05	12
Presque Isle, ME	0	0.00	31,241	0.59	0.00	0
<b>Legend</b>	Low Index (<80)			High Index (>120)		

(For complete list of DMA’s see appendices)

## Young Sophisticates

### Mindset – Social Values (Source Environics Research) \*

Strong Attitudes	
Aversion to Complexity	158
Traditional Gender Identity	140
Patriarchy	135
Cultural Assimilation	126
Emotional Control	126
Equal Relationship with Youth	124

Weak Attitudes	
Adaptability to Complexity	54
Just Deserts	54
Social Responsibility	52
Modern Racism	50
Crude Materialism	48
Anomie-Aimlessness	31



**Keep it simple – but not boring:** Although the Young Sophisticates have an aversion to complexity and are more open to simple, carefree activities they still feel the need for personal challenge. They enjoy setting difficult goals for themselves and don't stop until they achieve those goals.

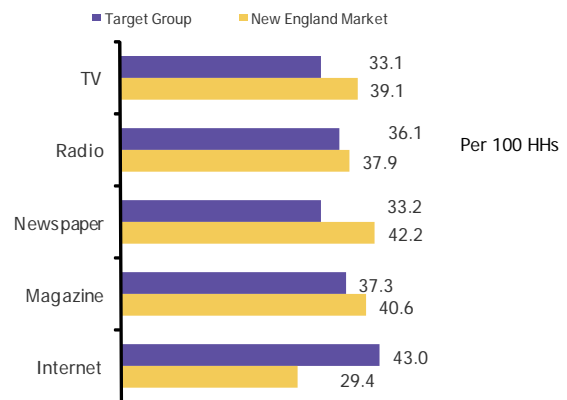
**Traditional family and gender outlook:** There is a strong belief with this group that traditional family and gender roles should be kept. The father is the master of his own home and men and women have distinct behaviours and roles.

**Emotions and ethics:** This group gives priority to reason and logic as the principal ways of understanding life, they are in control of their emotions. They also pay special attention to the perceived ethical and social responsibility practices of companies they choose to buy products from.

### Media Habits (Source Simmons)

- **TV:** Moderate viewers, mostly Primetime; best formats: primetime reality, evening animation. Best channels: pay-per-view sports/movies, Disney and Learning channels, MTV and HBO
- **Radio:** Moderate during drive time, heavy all day listeners, typically stations include easy listening, hot and adult contemporary and alternative
- **Newspapers:** Moderate readers of daily newspapers; best sections include: movie listings, entertainment, classifieds, general news and front page
- **Magazines:** Moderate readers of magazines; best formats are parenting, fashion, entertainment, sports/fitness/health
- **Online:** Heavy users, who are comfortable using The internet for all types of commerce

### Media Usage:



\*TV, Radio Measure "All Day Quintile 1" Magazine, Newspaper Measures "Quintile 1", Internet Measures "Internet Active at Home/Work, Quintile 1"



**Summary:**

**Where to Focus:**

**State:** The sum of all three lifestyle segments represents 49% of the New England market, with almost half of this groups (44.8%) residing in the State of Massachusetts. New Hampshire, although smaller in size is most heavily penetrated with six out of ten households in ACTP’s target market. Top States to consider are New Hampshire, Connecticut, Vermont and Massachusetts.









States within New England	ACTP New England Target Groups						Index
	Young Sophisticates	Exurban Explorer	Outdoorsy Elite	Total Target Groups	% of Mkt	% Pen	
<b>Total</b>	<b>449,405</b>	<b>1,236,092</b>	<b>1,072,759</b>	<b>2,758,256</b>	<b>100.00</b>	<b>49.26</b>	<b>100</b>
Connecticut	64,359	320,368	309,381	694,108	25.16	51.50	105
Maine	20,435	112,623	92,385	225,443	8.17	40.73	83
Massachusetts	272,850	566,233	396,999	1,236,082	44.81	49.01	100
New Hampshire	56,608	97,985	157,540	312,133	11.32	60.65	123
Rhode Island	25,531	81,288	52,942	159,761	5.79	39.01	79
Vermont	9,622	57,595	63,512	130,729	4.74	51.76	105

**DMA:** The following is a chart listing all of the Designated Market Areas within New England. Note that DMA’s can often cross State borders. In total there are eight DMAs within New England. Boston is the most densely populated also has the highest proportion of ACTP’s target segments (48%). Top markets to consider based on concentration and penetrations are Boston, Harford and New Haven. More than one in two households is ACTP’s target consumer.

Designated Market Areas (DMAs) within New England	ACTP New England Target Groups						Index
	Young Sophisticates	Exurban Explorer	Outdoorsy Elite	Total Target Groups	% of Mkt	% Pen	
<b>Total</b>	<b>444,491</b>	<b>1,142,229</b>	<b>1,006,160</b>	<b>2,592,880</b>	<b>100.00</b>	<b>49.23</b>	<b>100</b>
Portland-Auburn, ME	18,914	101,555	80,277	200,746	7.74	48.79	99
Boston et al, MA-NH	284,489	517,400	450,341	1,252,230	48.29	51.41	104
Providence et al, RI-MA	53,026	118,117	86,268	257,411	9.93	41.40	84
Burlington et al, VT-NY	10,769	65,640	85,977	162,386	6.26	48.34	98
Hartford & New Haven, CT	59,337	251,334	240,645	551,316	21.26	54.08	110
Bangor, ME	1,521	21,715	16,345	39,581	1.53	27.27	55
Springfield-Holyoke, MA	16,435	64,575	45,437	126,447	4.88	47.63	97
Presque Isle, ME	0	1,893	870	2,763	0.11	8.84	18

### Media Spend

Exurban Explorers is the easiest to reach through traditional media. They are strong across all media excluding online. The Outdoorsy Elite are strong readers and online users while the Young Sophisticates are the most challenging to reach with their busy schedules. To best reach this group we recommend using online and digital media. For a detailed list of online use please see appendices.

Media	Exurban Explorers 	Outdoorsy Elite 	Young Sophisticates 
TV 			
Radio 			
Newspaper 			
Magazines 			
Internet 			

**Print:** All target lifestyle segments are moderate to heavy readers of newspapers and magazines. The challenge ACTP faces is that the reading materials vary by lifestyle segments. We recommend focusing on newspapers in the key markets and select magazines. Exurban Explorers are the most widely read across most categories. Some top ranking publications include AARP, Golf Digest, New Yorker and The Smithsonian. The Outdoorsy Elite and Young Sophisticates are moderate to heavy readers however their interests are more focused. The titles the Outdoorsy Elite prefer are focused on outdoors such as Wheeler, Cycle World, Bassmaster, Boating, Wired, Outdoor Life and the like while the Young Sophisticates tend to focus on music, women’s fashion, men’s magazines and parenting. One popular magazine was United Airlines publication, Hemisphere.

**Online:** Many of the categories of interest identified above for reading should carry through with your online strategy with the exception of the Exurban Explorers who tend not to spend much time online. Because Outdoorsy Elite and Young Sophisticates tend to be more eclectic in their tastes ACTP can test specific categories of interest. Both groups tend to be tech-savvy and are keeping up with the latest technology. These two groups are a great testing ground for content and media, particularly in markets that are not as heavily concentrated.