

# United States

## Custom Segmentation Research



Date: October 6, 2010

Context: Summary Report

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### Research Objectives & Methodology

#### Research Objectives

Environics Analytics was commissioned to undertake a consumer segmentation analysis to profile high-potential travelers to Atlantic Canada from the Northeast region of the United States (New York, New Jersey and Pennsylvania).

#### Methodology

Data collected from visitors to Atlantic Canada, supplemented by inquiry databases, were used to identify the geographic origins of high-potential travelers, their demographic profiles and travel behaviours, their media preferences and Internet habits, and their key motivators.

### Key Findings

#### Consumer Segments

The analysis identified four, high potential consumer segments that were attracted to the tourism experiences offered in Atlantic Canada. The segments are:

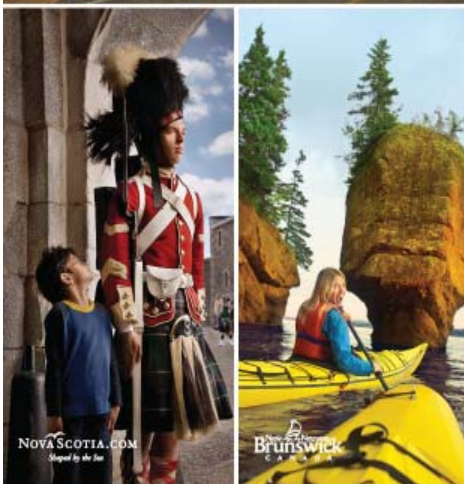
- Young Sophisticates
- Cosmopolitan Families
- Outdoorsy Elite
- Exurban Explorer

Each of the four consumer segments are summarized on the following page.



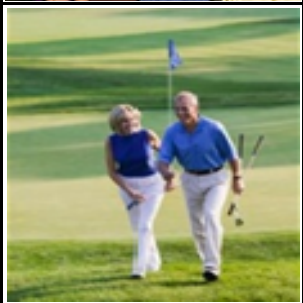

Detailed information on each of the four segment is available at

[http://www.actp-ptca.ca/scripts/pdf\\_files/2009ACTPUSCustomSegmentationResearch.pdf](http://www.actp-ptca.ca/scripts/pdf_files/2009ACTPUSCustomSegmentationResearch.pdf)

The Environics Analytics approach to consumer segmentation provides marketers with the information required to match each target group with the tourism products and experiences that most appeal to that segment. In addition, the analysis provides critical information to aid ACTP in developing the messaging and imagery of its marketing communications to reflect the lifestyles, attitudes and travel preferences of its key target groups.



## Priority Consumer Segments

<p style="text-align: center;"><b>Young Sophisticates</b></p>		<p style="text-align: center;">5.7% of NE Households</p>	<p>A mix of young singles and married couples with young children, leading active, free-wheeling lifestyles</p>
<p style="text-align: center;"><b>Cosmopolitan Families</b></p>		<p style="text-align: center;">10.2% of NE Households</p>	<p>Upscale families with teens in comfortable, established communities</p>
<p style="text-align: center;"><b>Outdoorsy Elite</b></p>		<p style="text-align: center;">10.1% of NE Households</p>	<p>Wealthy, highly-educated empty nests who tend to enjoy low-impact outdoor activities</p>
<p style="text-align: center;"><b>Exurban Explorers</b></p>		<p style="text-align: center;">12.9% of NE Households</p>	<p>Upscale empty nesters with the means and time to travel</p>

The Exurban Explorers and the Outdoorsy Elite target groups emerged as the primary consumer segments for Atlantic Canada.

### Exurban Explorers

The members of Exurban Explorers enjoy comfortable lifestyles mostly outside the big cities of New York and Philadelphia. Many of these households contain middle-aged and empty-nesting couples living in spacious homes in stable subdivisions. With their university degrees and positions in business and management, these Americans have deep pockets and wide-ranging interests.

They're more likely than average households to enjoy the performing arts — from ballet and opera to rock concerts and comedy shows. They have the financial wherewithal to buy tickets to attend professional sports like golf, soccer and baseball. And, these educated households enjoy the arts,

Exhibiting high rates for frequenting museums and art galleries, especially those that feature tours with interpreters and curators.

As travelers, Exurban Explorers enjoy intellectually stimulating activities. Their appreciation of multiculturalism can be seen in their fondness for travel to foreign countries where they can visit local art galleries, archaeological sites, ethnic festivals and fine arts performances. Many have an *Attraction to Crowds* and share a passion for cultural events, pro sports, farmers' markets and fireworks displays.

Exurban Explorers balance their cultural interests with athletic pursuits and satisfy their need for Personal Challenge through kayaking, sailing, snorkelling, skiing and mountain biking.

These households express their *Joy of Consumption* by splurging on luxury accommodations and pricey activities like golf and water sports. However, they have a surprisingly low *Need for Status Recognition* and also like inexpensive activities such as swimming, hiking and mini-golf.

With their educated and upscale profile, Exurban Explorers are strong media consumers. They like to go online for banking, shopping and researching products and services—including travel accommodations and activities. These suburban households typically commute to work and are a solid audience

for drive-time radio, especially jazz, classical music and news and sports programming. As educated couples, they are avid readers of newspapers and magazines. They typically go right to the sections featuring general news, editorials, food and travel.

They tend to subscribe to publications such as *The New Yorker*, *Smithsonian*, *AARP* and *Golf Digest*. With their extensive resources, they gather as much travel information as possible, relying on guide books, travel shows, websites and direct mail to ensure an enjoyable experience.

### Marketing Considerations: Exurban Explorer

#### *Communication Themes*

- ✓ Intellectual travelers – They enjoy learning while travelling and don't mind navigating through crowds to experience foreign culture
- ✓ Challenge their abilities – They exercise their bodies as well as their minds in participating in outdoor physical activities
- ✓ Indulgence – They pamper themselves with luxury accommodations and pricey activities like golf, but do not have the need to be recognized for these extravagances

#### *Travel Behaviours*

- ✓ Leisurely, educational vacations combining city lore and nature exploring
- ✓ Destinations: domestic and international locales that offer good food, water sports and a golf course
- ✓ Accommodation: a range of midscale to upscale hotels
- ✓ Information: A wide variety of information sources are consulted; guidebooks, official travel guides, maps, advice of friends and the Internet

#### *Creative Messaging*

- ✓ Upscale empty nest couples with the means and time to travel
- ✓ They enjoy learning about different cultures and travel to international destinations; however, including images of multicultural travelers will not appeal to this group
- ✓ Exurban Explorers like to balance their cultural experiences when travelling with physical activity to personally challenge themselves

#### *Touch Points*

- ✓ TV ads during daytime and evening news, movies, and informational shows
- ✓ Radio ads during drive time and throughout the day on all news/sports, classical and jazz stations
- ✓ Features and ads in the editorial, general news and travel sections of major daily papers; also features and ads in magazines such as *AARP*, *Golf Digest*, *Smithsonian* and *The New Yorker*
- ✓ Websites with testimonials from other travelers

### Outdoorsy Elite

The members of Outdoorsy Elite live in the exurban sprawl surrounding New York and Philadelphia as well as in a number of secondary cities such as Harrisburg, Pa., and Albany, N.Y. Wealthy, educated and white-collar, most are empty-nesting couples with

six-figure incomes and elegant homes in manicured subdivisions. To relax from their typically high-powered executive jobs, these fitness-minded adults prefer outdoor activities to indoor pursuits, exhibiting high rates for hiking, fishing, swimming, camping and kayaking.

In the winter, these are the hardy souls who frequent resorts and parks for skiing, snowmobiling and ice fishing. While they have an average interest in cultural events like plays, concerts and the opera, they are frequent spectators at golf matches, auto races and ice hockey games. But they prefer fresh air when winding down from their stressful jobs.

Outdoorsy Elite members are globe-trotting travelers who love the Great Outdoors. They frequently take vacation getaways to rustic settings where they can experience *Meaningful Moments*. With little *Need for Status Recognition*, they're okay with staying at mid-range hotels, all-inclusive resorts, campgrounds and cruises. Without any kids in tow, they score high for *Importance of Spontaneity* and are able to exercise their fondness for *Personal Control* when planning last-minute trips using websites, advice from friends and their own experiences. Once at their destinations, they like to spend their time outside—no surprise—and head for a beach, golf course

or hiking trail.

With their brains and bucks, Outdoorsy Elite make a strong market for both old and new media. They're heavy viewers of primetime and weekend television, particularly dramas, football and music on channels like ESPN, CMT and Home & Garden. Because of the constant driving demanded by their exurban communities, they spend a lot of time listening to the radio, especially stations featuring news and sports as well as classic rock and country music. Many read a daily newspaper and subscribe to magazines that cover home, general interest and sportsmen activities, including *Outdoor Life*, *Golf* and *Real Simple*. And despite their advancing age, the members of Outdoorsy Elite are big fans of the Internet—both at home and work—but they go online mostly for utilitarian purposes like travel planning and shopping rather than socializing and gaming.

### Marketing Considerations: Outdoorsy Elite

#### *Communication Themes*

- ✓ Outdoor Enthusiasts – This group enjoys meaningful experiences in beautiful natural settings
- ✓ Escape the everyday – These travelers choose domestic and foreign settings to escape the daily grind
- ✓ Spontaneous – Without children, this group can travel when the weather is good or to take advantage of an attractive deal
- ✓ In control – this group likes to be in control of the planning process by consulting websites and friends for advice

#### *Travel Behaviours*

- ✓ Relaxing couples' getaways to participate in outdoor activities
- ✓ Look for the most convenient mode of transport, not necessarily the most cost effective
- ✓ Destinations: domestic and foreign locations where good food and fresh air are abundant
- ✓ Information: Most types of information are used, particularly past experiences, advice from friends and relatives, official and other guidebooks and the web

#### *Creative Messaging*

- ✓ Upscale adult couples without children enjoying lavish lifestyles
- ✓ These Americans prefer outdoor activities to cultural events and would rather play than watch athletic activities
- ✓ Very low ethnic diversity in this group; however, they have a high acceptance of different cultures

#### *Touch Points*

- ✓ TV ads during late primetime network dramas, football, comedy shows and on channels such as CMT and Home & Garden
- ✓ Radio ads on classic rock, all news/sports, country, hot adult contemporary and Christian stations
- ✓ Features and ads on the front page or business, sports and classified sections of major daily papers; also features and ads in magazines with sportsmen's, general interest and home service titles
- ✓ More likely to use internet to research and shop than for entertainment