AUSTRALIA MARKET PROFILES

Australian travellers, driven by their continent home's remoteness, embark on epic, extended journeys that allow them to explore the world's most authentic and unexplored destinations. Fuelled by a passion for adventure and the desire for novelty, they seek out experiences that blend fun with deep cultural immersion.

Australians are drawn to destinations that are both friendly and sociable, embracing the chance to discover hidden gems and create enduring memories on their longer holidays.

AUSTRALIA

DESTINATION CANADA

A GUIDE
TO UNDERSTANDING THE PROFILE

THE STRUCTURE

HOW TO READ THE DATA

Percentage (%) values are beneficial, but we must also consider how one segment compares to others

An **index** is a tool that helps you understand the relative performance or significance of a particular value. Think of it like a reference point or a benchmark

FOR EXAMPLE:

Let's say **80%** of a segment who has been to Canada before loved their trip

On its own, this value might seem pretty good—after all, it's **80% satisfaction**

But if all other segments have a value of **90%+**, suddenly, that 80% doesn't look so great

Understanding indexes put values into perspective, allowing you to accurately assess their importance compared to the same value for the whole market

In these profiles, index values of **115+ are marked in blue** and mean the segment over-performs vs. the overall market. Values **under 85 are marked in orange** and mean the segment under-performs on this metric.

KEY DEFINITIONS

When reading the profiles, key definitions will be provided at the bottom of the page in a box like the below.

! **KEY** terminology on this page…

Additional definitions and details can be accessed by visiting the Glossary which can be clicked to wherever you see blue text, or by scrolling down to **page 104**.

MARKET OVERVIEW

KEY MARKET HIGHLIGHTS

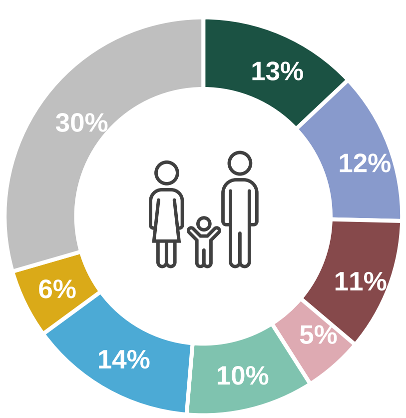
- One of the more nature and outdoor focussed markets, generally open to outdoor experiences and water sports (varying in intensity by segment), often seeking hidden gems.
- Overall inclined to value travel as an important way to access authentic experiences and be exposed to new perspectives.
- Friendly destinations which are safe and have adequate health standards are preferred.

Australians overindex for Fun & Sun Families, Culture Seekers, and Outdoor Explorers, often preferring activities such as overnight experiences, nature-based adventures, and water sports.

Australian travellers are particularly drawn to off-the-beaten-path destinations, where they can explore hidden gems while enjoying a relaxed atmosphere. Underindexing in non-travellers, Australians often prefer longer trips that allow them to fully immerse themselves in local culture and adventure.

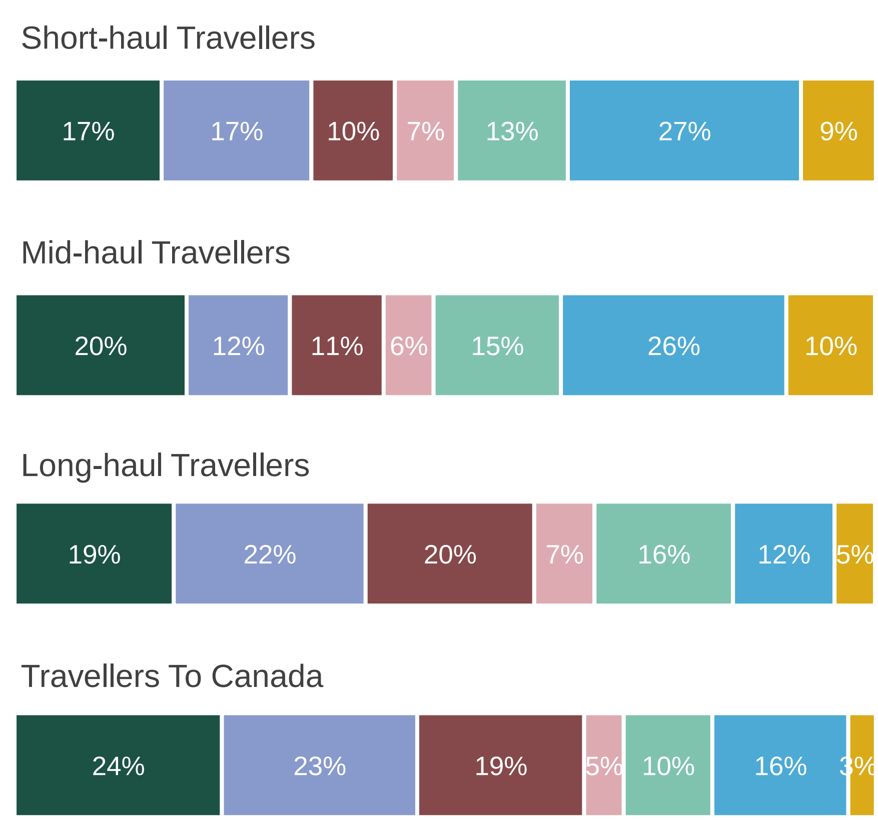
MARKET SIZING

POPULATION BREAKDOWN



29.7% of the adult population in Australia (est. **20M**) are non-travellers (est. **6M**). Reasons for not travelling are often financial or health related.

OUTBOUND TRAVELLERS' BREAKDOWN



KEY terminology on this page (for additional details and definitions see Glossary)

- **SHORT / MID / LONG HAUL** – No-Flight or < 3 Hours Flight / 3–7 Hour Flight / 7+ Hours Flight
- **NON-TRAVELLER** – Has not travelled a minimum of one night away in paid accommodation in past 5 years OR is not actively planning to travel in next 2 years.

MARKET SEGMENTS OVERVIEW

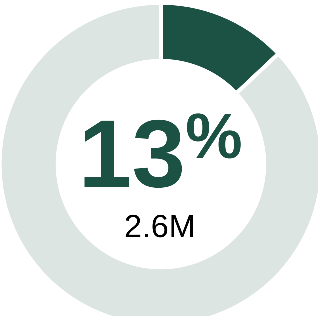
	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	**2.6M**	No	○ Nature Experiences ○ Water Sports ○ High-Intensity Sports	○ Adventure ○ Novel & Authentic ○ Accomplishment
CULTURE SEEKERS	**2.5M**	**Yes**	○ Cultural Experiences & Attractions ○ Festivals & Events ○ Cuisine	○ Novel & Authentic ○ Connections ○ Familiarity
REFINED GLOBETROTTERS	**2.1M**	No	○ Cultural Experiences & Attractions ○ Cuisine ○ Guided Tours	○ Novel & Authentic ○ Security ○ Bonding
PURPOSE DRIVEN FAMILIES	**0.9M**	No	○ Family-Focussed Attractions ○ Nature Experiences ○ Cultural Experiences & Attractions	○ Bonding ○ Novel & Authentic ○ Adventure
CITY TRIPPERS	**2.1M**	No	○ Shopping ○ Nightlife ○ Festivals & Events	○ Fun ○ Escape & Relax ○ Bonding
SIMPLICITY LOVERS	**2.7M**	No	○ Nature Experiences ○ Casual Sports ○ Cuisine	○ Escape & Relax ○ Security ○ Simplicity
FUN & SUN FAMILIES	**1.1M**	No	○ Family-Focussed Attractions ○ Shopping ○ Water Sports	○ Bonding ○ Escape & Relax ○ Fun

KEY terminology on this page (for additional details and definitions see Glossary)

- **DESTINATION CANADA PRIORITY SEGMENT** – Traveler segments prioritized by Destination Canada for targeted marketing and strategic efforts due to the opportunity they provide to contribute significantly to the Canadian tourism landscape. Aligning with these segments enables tourism partners to effectively coordinate with the national tourism strategy and maximizing their impact.
- **EMOTIONAL TRAVEL MOTIVATIONS** – These motivations were developed using factor analysis and provide insights into what drives traveller behaviour. Understanding these motivations helps to reveal drivers of more specific values and behaviours. For more detailed definitions of each base motivation please visit the Glossary.

OUTDOOR EXPLORERS

PSYCHOGRAPHICS – SUMMARY



% OF AUSTRALIA POPULATION

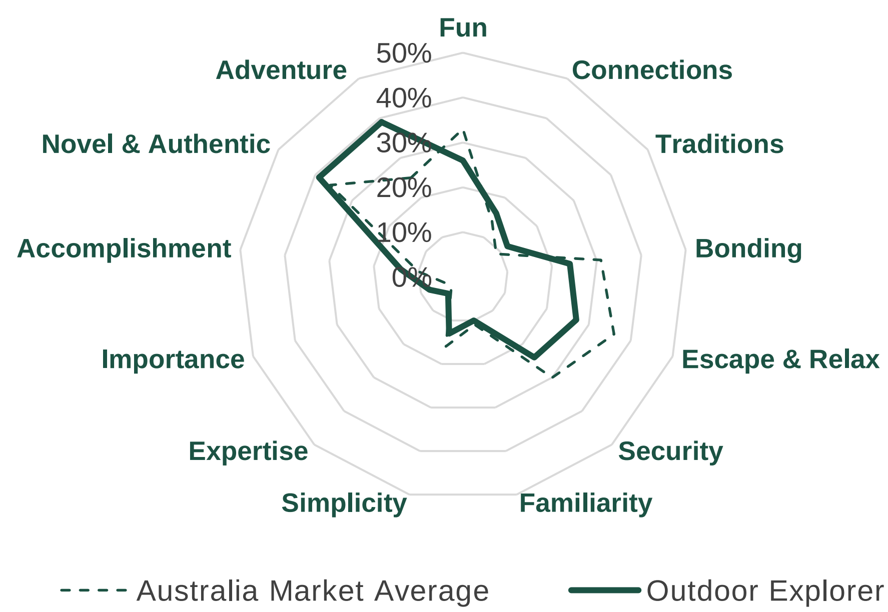
We are daring explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

We often seek adrenaline through physical activities, engaging with locals, and ensuring a positive impact. We embrace both short getaways and longer holidays, relishing in nature-related experiences.

WHAT YOU NEED TO KNOW ABOUT ME

1	We love travel and take all types of trips (domestic / international / business / bleisure).
2	We're nature enthusiasts driven by a sense of accomplishment from overcoming challenges in the great outdoors.
3	Spontaneous yet savvy travellers, we rely on online resources and apps for trip planning and booking.
4	We consider our impact on the locales we visit, and as a result intentionally engage with the communities we explore.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

112

How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison

TRAVELLER ECONOMIC INDEX

104

How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison

OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- Travel fuels personal growth. We constantly seek new destinations to learn from.
- Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment.
- We prioritize natural, adventurous, free-spirited, and unexplored destinations

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	80%	116
I'm always on the look out for new destinations to visit next	79%	123
I like my holiday to have some form of physical activity	79%	140
I like to come back from travels having learnt something new	74%	112
I generally think natural attractions are the highlights of my trip	72%	143
I'm passionate about travelling	70%	118
When I travel to natural environments, it makes me reflect on how fortunate I am	69%	122
I go where I want to go, no matter the hurdles	57%	133
I'm open to unconventional accommodations when travelling	54%	132
I enjoy living in the moment while travelling and don't worry much about what comes next	47%	116
I feel best on vacation when being highly active	47%	132
I like to keep my travel plans flexible and often book on short notice	42%	137
I'd be open to using AI-powered chatbots for travel planning and assistance	32%	131

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel a sense of adventure	50%	149
To be proud to share my travel experiences	29%	123
To push my limits and challenge myself	14%	139
To feel like I've accomplished something	14%	119
To create new, or take part in old, traditions	12%	117
To feel like I'm important	8%	129

DESIRED DESTINATION

	SCORE	INDEX
Adventurous	54%	152
Fun	38%	103
Unique	31%	116
Free-Spirited	24%	143
Open	19%	107
Unexplored	19%	148

OUTDOOR EXPLORERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We're under 35 years of age, and likely don't have kids yet.
- We're working full time, earning a moderate income. Some of us are also still finishing school.
- Find us in New South Wales and Queensland, or remote areas of Australia.

AGE

	SCORE	INDEX
18-34	37%	123
35-54	33%	99
55+	29%	91
MEAN YEARS	44.3	87

HH INCOME (CAD)

	SCORE	INDEX
$35K or less	21%	100
>$35K to $105K	66%	101
More than $105K	10%	106
Refused	3%	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	48%	118
Employed PT	17%	99
Self-employed	4%	76
Retired	19%	93

EDUCATION

	SCORE	INDEX
Primary education or less	1%	136
Secondary education	20%	80
Post-secondary education	79%	117

73%
103 Have a valid passport

GENDER

52% 111 Male

48% 89 Female

0% 100 Non-binary / Other

HOUSEHOLD

31% 99 Children <18 Living At Home*

9% 84 Children 18+ Living At Home*

20% 92 Children NOT Living At Home*

49% 107 No Children

** Option is not exclusive*

AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	35%	112
Victoria	24%	78
Queensland	24%	127
South Australia	7%	96
Western Austraila	7%	55
Tasmania	2%	97
Australian Capital Territory	2%	105

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

99

TRAVEL TRADE INDEX: **GROUP**

114

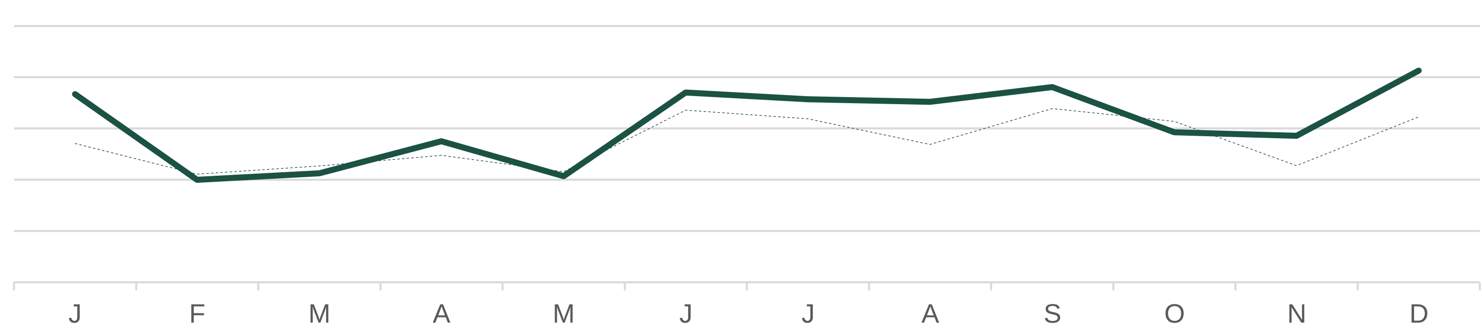
KEY terminology on this page

- **TRAVEL TRADE INDEX – NON-GROUP –** The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP –** The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

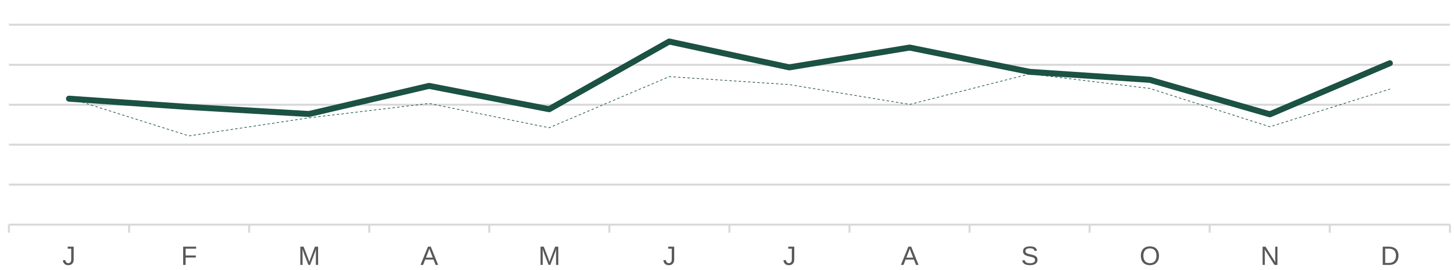
For Flights of 3–7 Hours



Outdoor Explorer

Market Average

For Flights of 7+ Hours



Outdoor Explorer

Market Average

TRIP DURATION

		INDEX
1-2 Days	41%	123
3-5 Days	30%	145
1 Week Holiday	18%	133
2 Weeks Holiday	11%	120
3 Weeks Or More	8%	124

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	41%	86
International Leisure	9%	107
Business Trip	12%	124
Added Personal To Business	5%	103
Worked During Vacation	7%	119

Incidence is frequency of 2+ times per year

DESTINATION CANADA

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	43%	83
Vacation Rental (e.g., Airbnb, Vrbo)	23%	107
Friend's or family's place	23%	88
Campsite	19%	122
Budget Hotel	18%	140
Premium Hotel	13%	73

THOUGHTS ON INDIGENOUS TRAVEL

56%

117 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

12%

98 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I like to explore places that are off the beaten path and less explored	74%	132
I really want to learn about the history of the destinations I visit	69%	102
I'm willing to put in the effort while travelling in order to see lesser-known places	68%	127
You only ever get to know a country by experiencing its culture	68%	89
I'm open to travelling to destinations with limited tourist infrastructure	66%	137
I'm open to visiting destinations with challenging climates or weather conditions	48%	133

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel with our partner, sometimes with friends.
- Our budgets are moderate, though we may spend on experiences.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	55%	86
Solo	21%	113
Adult relatives	18%	89
Kids	17%	96
Friends	12%	116

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,500

101
INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	60%	104
I consider the impact that I personally have on the destinations I visit	59%	113
It's important to me that I visit somewhere that is open to diversity and inclusion	49%	102
Hearing from underrepresented communities is an important part of travelling	43%	112
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	39%	115

49%

PRIORITIZE SUSTAINABLE TRAVEL

118 INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIORITIZE SUSTAINABLE TRAVEL –** The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- All sports are of interest, we are not deterred by a challenging new activity.
- Guided tours that provide unique and novel access to nature are attractive.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	**76%**	145
○ Nature walks	**48%**	149
○ Visiting nature parks or preserves	**41%**	143
○ Oceanside beaches	**41%**	142
Water-based sports	**22%**	128
○ Swimming	**14%**	120
○ Kayaking, canoeing, or paddle-boarding	**11%**	127
Casual sports	**18%**	141
○ Casual biking	**7%**	146
○ Fishing	**6%**	100
High-intensity sports	**12%**	141
○ Bungee jumping or skydiving	**4%**	142
○ Whitewater rafting	**3%**	131
Winter-based sports	**12%**	138
○ Snowboarding or downhill skiing	**8%**	142
○ Ice skating or hockey	**4%**	130
Cultural experiences or attractions	**43%**	80
Local cuisine	**33%**	65
Guided tours	**31%**	107
Overnight experiences	**25%**	103
Family-focused attractions	**23%**	91
Festivals and events	**22%**	86
Shopping	**22%**	65

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF **3–7 HOURS**		TRIPS OF FLIGHTS OF **7+ HOURS**	
	SCORE	**INDEX**	**SCORE**	**INDEX**
To relax and unwind	**53%**	76	**52%**	75
For adventure and excitement	**42%**	125	**47%**	134
To spend time with family	**38%**	95	**33%**	89
To escape from routine	**33%**	76	**35%**	88
To check off dream travel places	**13%**	88	**27%**	107
To have fun with friends	**18%**	93	**12%**	71
To learn through other cultures	**33%**	115	**33%**	101
For a romantic getaway	**21%**	129	**10%**	101
To have memories from top travel spots	**13%**	106	**19%**	126

EXTERNAL TRIP TRIGGERS

	SCORE	**INDEX**	**SCORE**	**INDEX**
Partner / spouse wanted to go	**40%**	84	**41%**	84
Visiting friends / family	**35%**	81	**35%**	78
Family / friends wanted to go	**34%**	108	**32%**	107
Special event (e.g., wedding, reunion)	**22%**	81	**13%**	57
Festival or event	**21%**	111	**22%**	106
Kids wanted to go	**17%**	100	**16%**	99

19% 96 INDEX SCORE

Travel aligns with children's school schedule

29% 106 INDEX SCORE

Take time off for vacation during major holidays

19% 106 INDEX SCORE

Difficult to take more than a few days of vacation at once

OUTDOOR EXPLORERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We are always thinking about our next trips, generally researching all types of trips (short-haul or otherwise) well in advance.

68%

Primary Trip Planner

115
INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIMARY TRIP PLANNER –** The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 3 months
- Online videos
- Travel review sites

Booked Transportation – 2.1 months
- Direct with company

Booked Accommodation – 1.8 months
- Travel booking sites / apps

Booked Activities – 1.7 months
- Travel booking sites / apps

FLIGHT OF 7+ HOURS

Started Researching and Planning – 5.9 months
- Travel booking sites / apps
- Travel review sites

Booked Transportation – 4.5 months
- Direct with company

Booked Accommodation – 4 months
- Travel booking sites / apps

Booked Activities – 2.8 months
- Direct with company
- Travel booking sites / apps

Timeline

- **7 MONTHS +** BEFORE MY TRIP
- **6 MONTHS** BEFORE MY TRIP
- **5 MONTHS** BEFORE MY TRIP
- **4 MONTHS** BEFORE MY TRIP
- **3 MONTHS** BEFORE MY TRIP
- **2 MONTHS** BEFORE MY TRIP
- **1 MONTH** BEFORE MY TRIP
- **MY TRIP BEGINS!**
- **DURING** MY TRIP

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips are to adventure and nature destinations
- At times we take trips like Culture Seekers and Simplicity Lovers.

KEY terminology on this page (for additional details and definitions see Glossary)

- **SEGMENT ALIGNMENT –** The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS: 8% — 110 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Adventure Destination		
COMPANIONS	Couple only	**40%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Novel & Authentic	Adventure
ACTIVITIES	Nature walks	**35%**	
	Oceanside beaches	**31%**	
	Viewing wildlife in natural habitat	**29%**	
KEY BEHAVIOURS	Seeking variety of access to adventure, may be a bucket list destination		

% OF TOTAL TRIPS: 8% — 107 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Wildlife & Nature Reserve		
COMPANIONS	Couple only	**29%**	
	Alone	**25%**	
TRIP EMOTIONAL MOTIVATIONS	Adventure	Novel & Authentic	Bonding
ACTIVITIES	Nature walks	**35%**	
	Visiting nature parks or preserves	**32%**	
	Historical or archeological sites	**20%**	
KEY BEHAVIOURS	Seeking novel and unique access to wildlife and landscapes, likely camping		

% OF TOTAL TRIPS: 21% — 110 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre	**27%**	
	Small cities and town	**14%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Security	Novel & Authentic
ACTIVITIES	Cafes or bakeries	**36%**	
	Local restaurants	**36%**	
	Museums	**28%**	
KEY BEHAVIOURS	Laid back trip to visit friends in a city, taking in local attractions		

% OF TOTAL TRIPS: 36% — 143 INDEX SCORE

SEGMENT ALIGNMENT: ●●○○○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort	**19%**	
	Small cities and town	**19%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants	**40%**	
	Cafes or bakeries	**31%**	
	Outdoor markets	**18%**	
KEY BEHAVIOURS	Relaxing and reliable down-time with our partner, less active		

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek access to adventure, wildlife and nature, and if it's remote and less-explored, even better!
- We frequent various Asian or Pacific destinations due to proximity, but also explore Europe and South America.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Australia	**52%**	91
New Zealand	**6%**	119
Indonesia	**4%**	106
China	**3%**	141
Japan	**3%**	88

	SCORE	INDEX
India	**3%**	135
Italy	**3%**	106
USA	**3%**	95
France	**3%**	100
UK	**2%**	78

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	**48%**	144
Provides opportunities to view wildlife in its natural habitat	**44%**	151
Provide access to unique natural wonders	**41%**	146
Provides numerous opportunities for outdoor adventures	**32%**	151
Offers a range of scenic viewpoints	**32%**	135
Offers natural landscapes in close proximity to city amenities	**29%**	136
Provides a remote, no-frills experience	**15%**	135
Offers options for adrenaline seekers	**11%**	149

OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

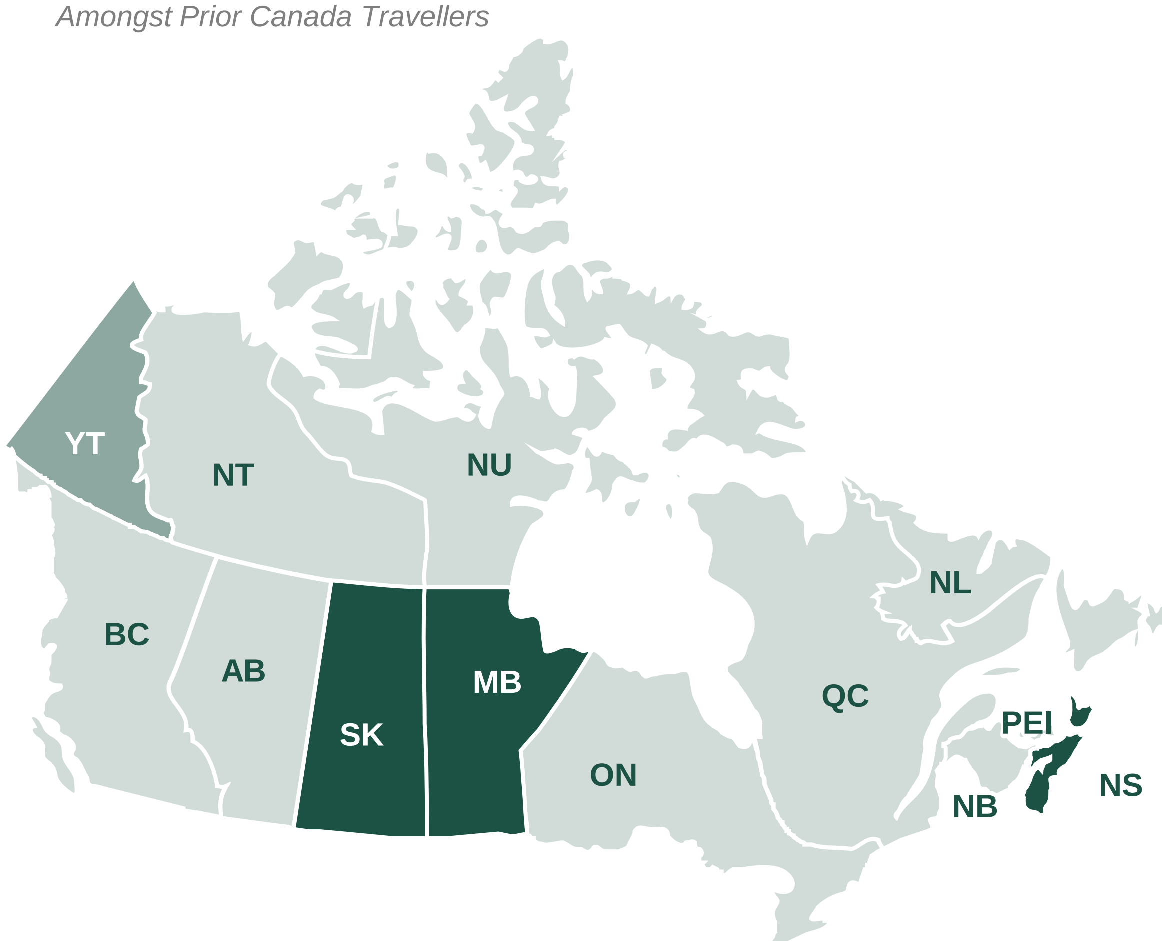
- We have likely been to Canada before, and more than once.
- We over-index for visiting nearly all provinces in Canada, with the greatest propensity for the East Coast and the Territories.
- Canada is on the list for future travel. We are thinking about camping and opportunities to see the Northern Lights.

WHERE DO WE WANT TO GO IN CANADA

TORONTO WINNIPEG MONTREAL BANFF
ARCTIC CIRCLE WATERFALLS ALBERTA QUEBEC CITY
OTTAWA NEWFOUNDLAND
NIAGARA FALLS VANCOUVER NOVA SCOTIA
LAKE LOUISE
WHISTLER VICTORIA BRITISH COLUMBIA
ONTARIO CALGARY ROCKY MOUNTAINS

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	28%	90
BC	53%	102
MB	10%	133
NB	9%	108
NL	6%	104
NS	17%	134
NT	6%	115
NU	2%	110
ON	37%	97
PEI	6%	100
QC	30%	105
SK	10%	128
YT	9%	117

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- All seasons interest us.
- Those of us who haven not visited, are considering it in the future, and have already done some detailed research about Canada.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	**26%**	**30%**	**39%**	**27%**
VS. TOTAL MARKET	22%	28%	42%	25%

16%

Been to Canada in last 5 years

123 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

	%	INDEX
Definitely	8%	121
Very likely	10%	127
Somewhat likely	17%	109
Not very likely	19%	85
Not considering Canada	47%	86

FAMILIARITY WITH CANADA

	%	INDEX
Been To Canada Multiple Times	12%	119
Been To Canada Once	18%	121
I know a lot about travel in Canada	4%	112
I have researched it, but only superficially	12%	105
I have heard it, but never looked into it	42%	73
I have never heard about travel in Canada	12%	91

OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Recent life changes have included a career move and / or moving to a new city.
- Beyond travel, our extra income is spent on our home and savings.

MAJOR LIFE EVENTS IN LAST 5 YEARS

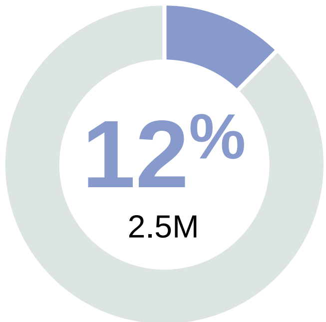
8% Had a child — 98 INDEX SCORE	**34%** Started a new job / career — 105 INDEX SCORE	**16%** Bought a new home — 91 INDEX SCORE	**17%** Moved to a new city — 117 INDEX SCORE
5% Child started school — 94 INDEX SCORE	**40%** Purchased a car — 109 INDEX SCORE	**5%** Retired — 89 INDEX SCORE	**20%** Renovated house — 108 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	63%	102
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	52%	134
Savings and investments	48%	91
Personal care and wellness	34%	75
Experiences (e.g., concerts, events).	32%	101
Technology and gadgets	20%	110

CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



% OF AUSTRALIA POPULATION

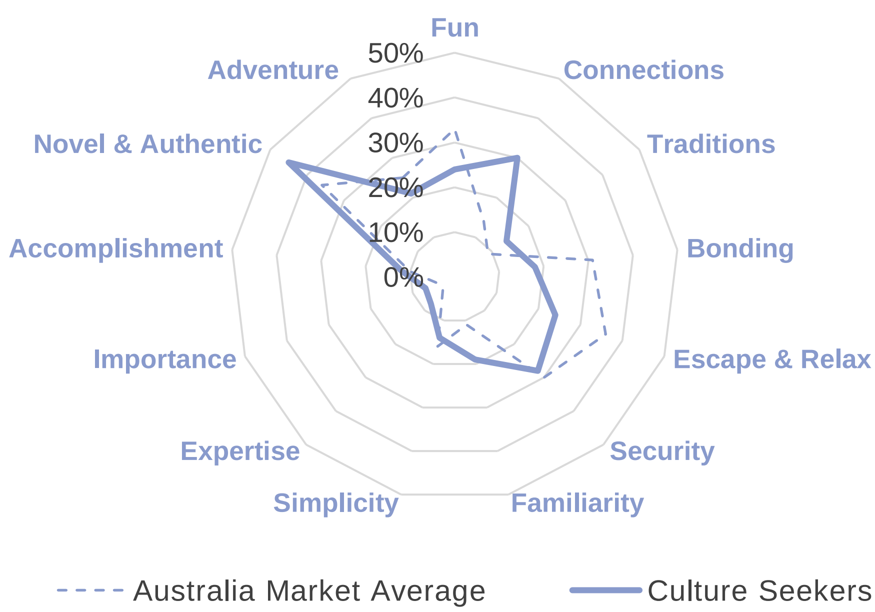
We are sociable, free-spirited individuals who seek unique, authentic experiences. We thrive on immersing ourselves in new perspectives, local culture, making connections, which boosts our energy and confidence.

We prefer vibrant city life, dynamic arts scenes, and culturally rich destinations. We prioritize diversity, inclusion, and sustainability, and open to both short and longer trips. Travel is an investment we make in ourselves.

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize diversity, inclusion, sustainability and supporting the local economy.
2. We like the challenge of a new experience, and aren't afraid of trying something different like unconventional accommodations.
3. We try to learn the basics of the language before we travel and learn about the history of the destinations we visit.
4. We like exploring less-visited places, getting into nature, and value hearing from underrepresented communities.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

132

How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison

TRAVELLER ECONOMIC INDEX

117

How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison

CULTURE SEEKERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We seek authentic experiences, embracing new perspectives and connecting with locals.
- We are dedicated to sustainable travel, ensuring we respect and preserve the environment.
- Staying flexible and being open to spontaneous experiences is how we get the most out of travel.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	80%	125
Trying out local cuisine is a really important part of travel	76%	123
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	73%	128
When I travel to natural environments it makes me reflect on how fortunate I am	69%	122
I am more likely to select destinations / activities that invest in socially responsible tourism	67%	122
I learn the basics of a language before visiting a country / region	61%	133
I like natural attractions but I don't usually think they are the highlights of my trip	58%	124
I go where I want to go, no matter the hurdles	52%	124
I'm open to unconventional accommodations when travelling	47%	120
I seek out destinations where I can explore my ancestral heritage	42%	129
I feel best on vacation when being highly active	40%	117
I like to keep my travel plans flexible and often book on short notice	37%	120
I'd be open to using AI-powered chatbots for travel planning and assistance	28%	117

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	48%	132
To open my mind to new perspectives	37%	122
To feel connected with new people	30%	144
To feel like a local	24%	142
To be familiar with my surroundings	15%	127
To create new, or take part in old, traditions	14%	123

DESIRED DESTINATION

	SCORE	INDEX
Unique	32%	121
Accepting	32%	141
Charming	27%	131
Open	26%	137
Passionate	12%	114
Unexplored	10%	113

CULTURE SEEKERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We represent a diverse age range and most of us don't have children.
- We are generally employed full-time.
- We are most likely to be found in New South Wales and Victoria.

AGE

	SCORE	INDEX
18-34	**35%**	117
35-54	**34%**	100
55+	**31%**	93
MEAN YEARS	**45.3**	90

HH INCOME (CAD)

	SCORE	INDEX
$35K or less	**21%**	99
>$35K to $105K	**67%**	108
More than $105K	**9%**	101
Refused	**3%**	79

EMPLOYMENT

	SCORE	INDEX
Employed FT	**48%**	118
Employed PT	**13%**	83
Self-employed	**8%**	139
Retired	**19%**	94

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	92
Secondary education	**17%**	70
Post-secondary education	**82%**	132

80%
118 Have a valid passport

GENDER

58% 129 Male

42% 71 Female

1% 114 Non-binary / Other

HOUSEHOLD

26% 96 Children <18 Living At Home*

6% 61 Children 18+ Living At Home*

20% 92 Children NOT Living At Home*

54% 112 No Children

** Option is not exclusive*

AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	**38%**	136
Victoria	**29%**	117
Queensland	**15%**	77
Western Austraila	**10%**	100

	SCORE	INDEX
South Australia	**6%**	87
Tasmania	**1%**	73
Australian Capital Territory	**1%**	82

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

121

TRAVEL TRADE INDEX: **GROUP**

112

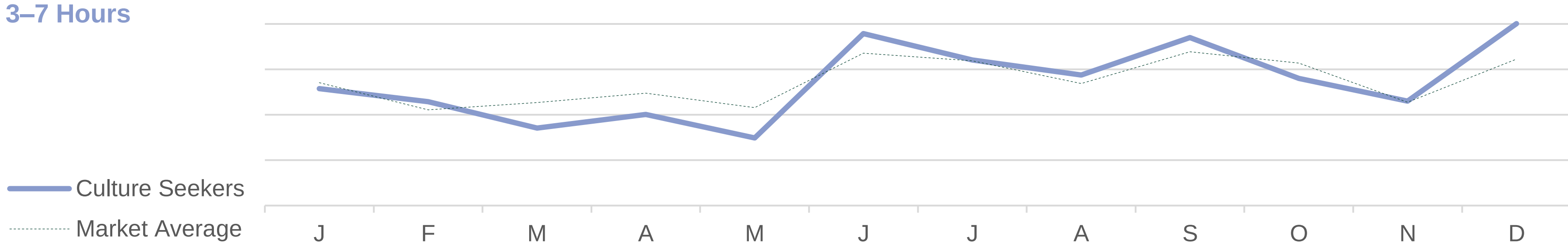
KEY terminology on this page

- **TRAVEL TRADE INDEX – NON-GROUP –** The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP –** The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

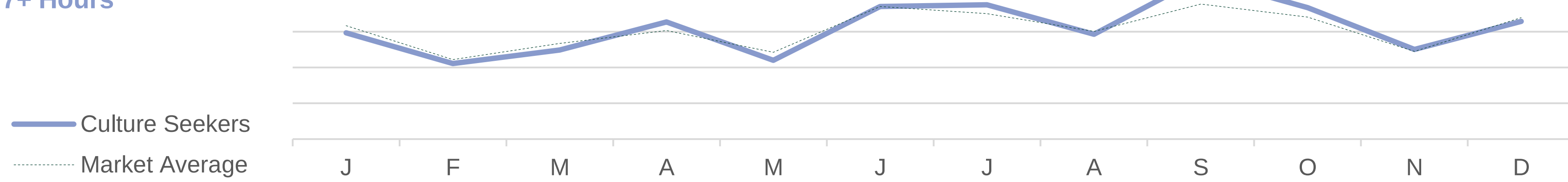
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

	%	INDEX
1-2 Days	39%	111
3-5 Days	24%	108
1 Week Holiday	15%	116
2 Weeks Holiday	10%	111
3 Weeks Or More	8%	121

Incidence is frequency of 2+ times per year

TRIP TYPE

	%	INDEX
Domestic Leisure	42%	103
International Leisure	11%	116
Business Trip	13%	127
Added Personal To Business	10%	143
Worked During Vacation	8%	121

Incidence is frequency of 2+ times per year

CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**47%**	100
Friend's or family's place	**29%**	112
Vacation Rental (e.g., Airbnb, Vrbo)	**26%**	125
Premium Hotel	**21%**	102
Budget Hotel	**13%**	110
Bed & Breakfast	**10%**	140

THOUGHTS ON INDIGENOUS TRAVEL

66%

132 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

21%

138 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	**85%**	133
You only ever get to know a country by experiencing its culture	**81%**	130
I like to explore places that are off the beaten path and less explored	**68%**	124
I'm willing to put in the effort while travelling in order to see lesser-known places	**67%**	124
I'm open to travelling to destinations with limited tourist infrastructure	**53%**	113
I'm open to visiting destinations with challenging climates or weather conditions	**43%**	123

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel primarily as a couple, and sometimes alone.
- Our budgets are usually mid-ranged, but can splurge on some couples trips.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**50%**	75
Solo	**27%**	132
Adult relatives	**16%**	74
Kids	**15%**	95
Friends	**8%**	94

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,640

106
INDEX SCORE

SPEND STYLE

Mid-range to Premium

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	**74%**	139
I consider the impact that I personally have on the destinations I visit	**69%**	130
It's important for me to know that the money I spend will support the local economy I'm visiting	**68%**	131
Hearing from underrepresented communities is an important part of travelling	**57%**	135
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**46%**	128

56%

PRIORITIZE SUSTAINABLE TRAVEL

130 INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIORITIZE SUSTAINABLE TRAVEL –** The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We like exploring popular places and trendy but less-travelled experiences.
- We enjoy both cultural attractions, and being active in nature.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	**66%**	130
○ Museums	**44%**	128
○ Historical or archeological sites	**38%**	122
○ Visiting local monuments	**38%**	128
Local cuisine	**57%**	116
○ Local restaurants	**46%**	112
○ Street cuisine	**35%**	123
Festivals and events	**44%**	136
○ Music concerts or festivals	**24%**	124
○ Cultural or traditional festivals	**23%**	145
Nightlife	**22%**	117
○ Bars and pubs	**19%**	121
○ Clubs and dancing	**12%**	119
High-intensity sports	**9%**	121
○ Bungee jumping or skydiving	**2%**	111
○ Mountain biking	**3%**	119
Nature experiences	**43%**	83
Shopping	**40%**	99
Guided tours	**26%**	95
Overnight experiences	**25%**	107
Family-focused attractions	**19%**	87
Health and wellness	**17%**	112
Casual sports	**11%**	88

CULTURE SEEKERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	54%	77	55%	86
To spend time with family	30%	86	36%	92
To escape from routine	42%	98	32%	77
To learn through other cultures	30%	110	43%	121
For adventure and excitement	33%	106	31%	102
To have fun with friends	20%	103	20%	118
To check off dream travel places	20%	114	26%	104
For personal reflection and growth	23%	134	20%	133
For a romantic getaway	10%	85	7%	84

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Visiting friends / family	37%	88	36%	86
Partner / spouse wanted to go	36%	77	40%	82
Family / friends wanted to go	31%	94	23%	86
Festival or event	23%	118	26%	118
Special event (e.g., wedding, reunion)	31%	118	30%	122
Kids wanted to go	13%	95	9%	92

21% 99 INDEX SCORE

Travel aligns with children's school schedule

28% 103 INDEX SCORE

Take time off for vacation during major holidays

20% 112 INDEX SCORE

Difficult to take more than a few days of vacation at once

DESTINATION CANADA

CULTURE SEEKERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We are generally planning within 4 months of a trip, and using many information resources

76%

Primary Trip Planner

145

INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIMARY TRIP PLANNER –** The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

Planning timeline

7 MONTHS + BEFORE MY TRIP

6 MONTHS BEFORE MY TRIP

5 MONTHS BEFORE MY TRIP

4 MONTHS BEFORE MY TRIP

3 MONTHS BEFORE MY TRIP

2 MONTHS BEFORE MY TRIP

1 MONTH BEFORE MY TRIP

MY TRIP BEGINS!

DURING MY TRIP

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 3.4 months
- Recommendations from friends or family

Booked Transportation – 2.7 months
- Direct with company

Booked Accommodation – 2.1 months
- Direct with company

Booked Activities – 1.6 months
- Direct with company

FLIGHT OF 7+ HOURS

Started Researching and Planning – 5.6 Months
- Recommendations from friends or family

Booked Transportation – 4.1 months
- Direct with company

Booked Accommodation – 3.3 months
- Travel booking sites / apps

Booked Activities – 2.4 months
- Direct with company
- Travel booking sites / apps

CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips enjoy the culture, food, music, and shopping of a destination
- Some couples trips are more like Refined Globetrotters.

KEY terminology on this page (for additional details and definitions see Glossary)

- **SEGMENT ALIGNMENT –** The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS 27% — 121 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		27%
	Small cities and town		14%
TRIP EMOTIONAL MOTIVATIONS	Fun	Security	Novel & Authentic
ACTIVITIES	Cafes or bakeries		36%
	Museums		28%
	Visiting famous shopping centres		16%
KEY BEHAVIOURS	Exploration of safe and trendy destinations, not planned too far in advance		

% OF TOTAL TRIPS 12% — 125 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		33%
	Alone		27%
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Security
ACTIVITIES	Museums		54%
	Street cuisine		43%
	Outdoor markets		40%
KEY BEHAVIOURS	Authentic experience, immersed in a new culture. Planned well in advance		

% OF TOTAL TRIPS 21% — 167 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Alone		36%
	Couple only		28%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Security
ACTIVITIES	Local restaurants		44%
	Museums		30%
	Visiting famous shopping centres		29%
KEY BEHAVIOURS	Visiting friends, connecting, trying local restaurants and nightlife		

% OF TOTAL TRIPS 36% — 138 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		13%
	Small cities and town		13%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants		54%
	Cafes or bakeries		37%
	Visiting nature parks or preserves		20%
KEY BEHAVIOURS	May be all-inclusive or a cruise, booked more in advance with a higher budget		

CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek rich culture and heritage, with a variety of museums and historical sites.
- Many of us travel within Australia. We also visit Japan, Indonesia, Singapore and New Zealand.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Australia	**44%**	74
Japan	**5%**	128
New Zealand	**5%**	97
France	**4%**	140
Indonesia	**4%**	118

	SCORE	INDEX
USA	**4%**	121
Italy	**4%**	122
UK	**3%**	107
Singapore	**3%**	121
Germany	**3%**	134

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**44%**	128
Has a variety of museums and / or historical sites	**37%**	138
Is inclusive and tolerant	**35%**	149
Provides a variety of local festivals and events	**27%**	146
Has a thriving arts and music scene	**24%**	153
Offers an energetic and dynamic cultural scene	**22%**	150
Offers an eccentric and unique atmosphere	**18%**	139
Has vibrant nightlife and entertainment	**17%**	126

CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

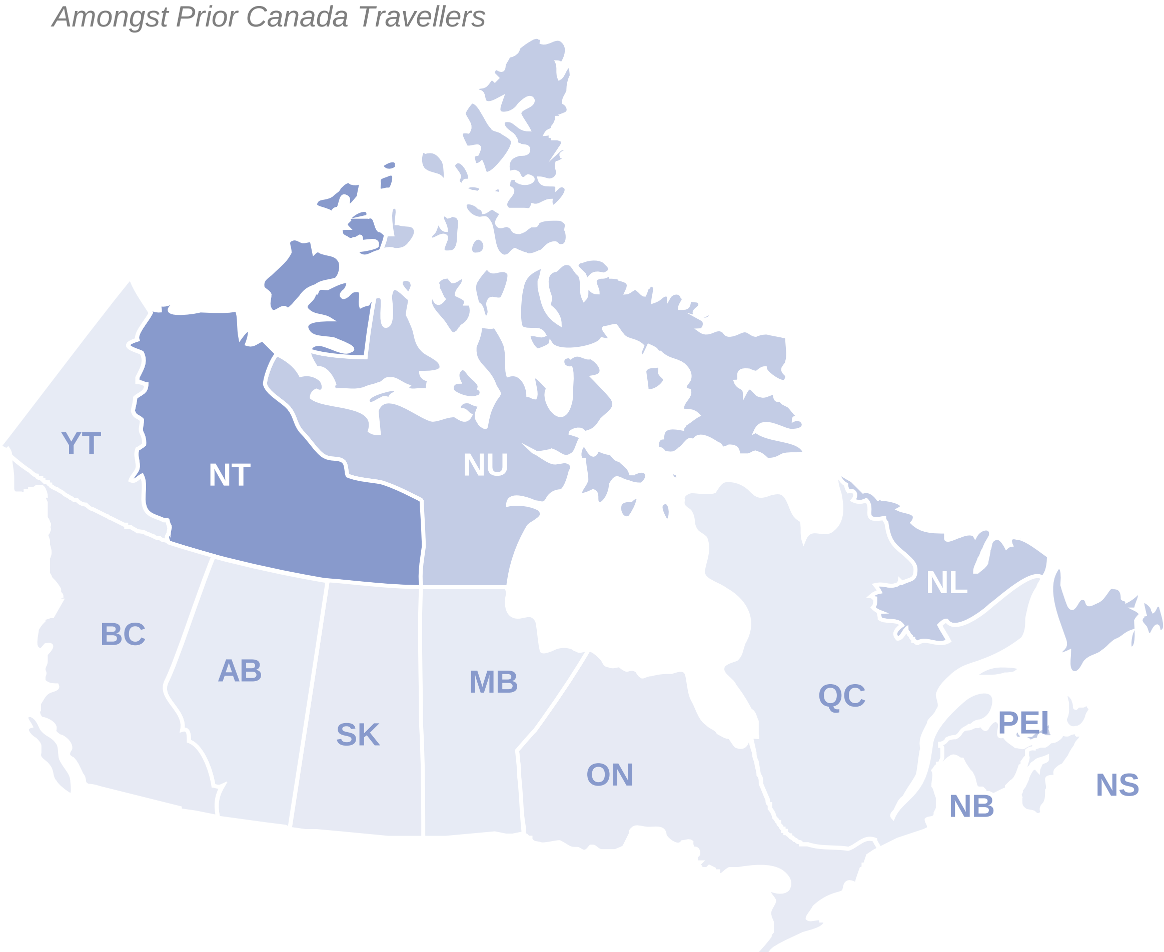
OVERALL INSIGHT

- Many of us have never visited Canada. Those have visited have likely only been once.
- We have explored a range of provinces, favouring Ontario, British Columbia and Quebec, but also ventured into the Prairies, Atlantic Canada, and the Territories.
- A future visit could include Toronto or Vancouver.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	30%	97
BC	44%	80
MB	4%	92
NB	10%	112
NL	8%	116
NS	12%	100
NT	7%	125
NU	3%	122
ON	41%	112
PEI	10%	121
QC	29%	103
SK	4%	87
YT	5%	91

CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Most travel to Canada has been done during the summer as well as January and February.
- A number of us are likely to return to Canada but probably not in the next couple of years, especially those who have visited before.
- Overall, our knowledge of Canada as a travel destination has an opportunity to grow.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CULTURE SEEKERS	**25%**	**28%**	**38%**	**25%**
VS. TOTAL MARKET	22%	28%	42%	25%

17% Been to Canada in last 5 years

128 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

	%	INDEX
Definitely	7%	117
Very likely	8%	112
Somewhat likely	20%	128
Not very likely	20%	96
Not considering Canada	45%	82

FAMILIARITY WITH CANADA

	%	INDEX
Been To Canada Multiple Times	13%	122
Been To Canada Once	17%	115
I know a lot about travel in Canada	4%	112
I have researched it, but only superficially	14%	113
I have heard it, but never looked into it	43%	75
I have never heard about travel in Canada	10%	86

CULTURE SEEKERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- We primarily spend our money on leisure travel and experiences.
- In the last 5 years, we have purchased a new car, started a new job, and some of us have also invested in home renovations or bought a new home.

MAJOR LIFE EVENTS IN LAST 5 YEARS

7%
Had a child
96 INDEX SCORE

38%
Started a new job / career
116 INDEX SCORE

19%
Bought a new home
113 INDEX SCORE

16%
Moved to a new city
111 INDEX SCORE

8%
Child started school
99 INDEX SCORE

41%
Purchased a car
114 INDEX SCORE

6%
Retired
98 INDEX SCORE

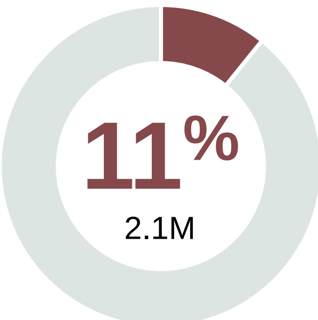
20%
Renovated house
109 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**62%**	101
Savings and investments	**45%**	73
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**44%**	104
Experiences (e.g., concerts, events).	**35%**	113
Personal care and wellness	**34%**	70
Technology and gadgets	**25%**	143

REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



% OF AUSTRALIA POPULATION

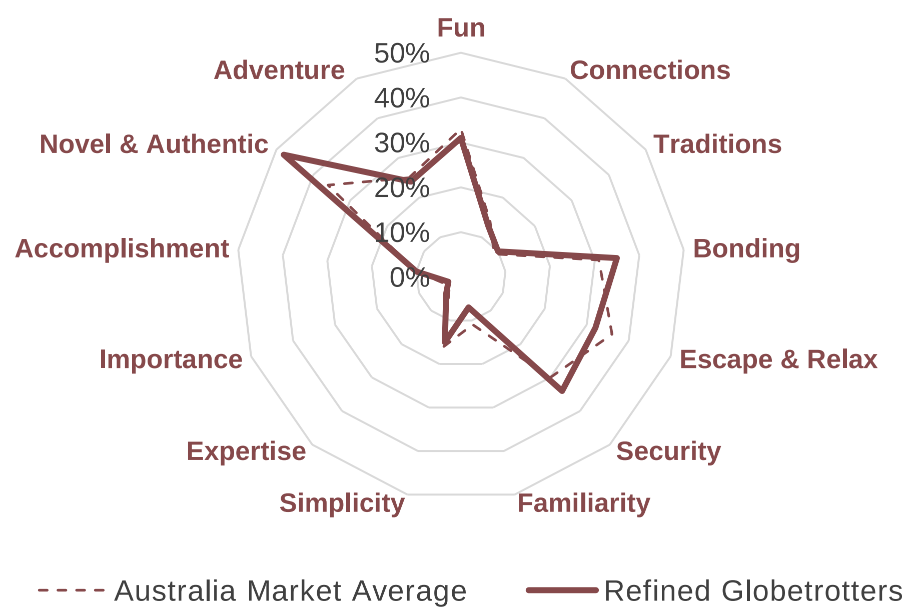
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

We immerse ourselves in history, museums, and seek to learn something new from the cultures we experience. We ensure smooth travel with all-inclusive packages and expert-guided tours.

WHAT YOU NEED TO KNOW ABOUT ME

1. Travel is our #1 spending priority.
2. We have the flexibility to travel at any time of year, as our kids are grown up.
3. We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.
4. Being open to new perspectives and learning about new cultures is important part of our travels.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

103

How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison

TRAVELLER ECONOMIC INDEX

135

How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison

REFINED GLOBETROTTERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We seek discovery through experiences, and a sense of accomplishment through our travels.
- We want to experience luxury and indulge in world-class experiences, and tend not to think about budget.
- Joining tours and working with travel agents ensures a smooth, enlightening travel experience.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	83%	124
I'm always on the look out for new destinations to visit next	81%	126
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	73%	127
I'm passionate about travelling	70%	118
I'm a planner, while travelling I like to know what comes next	68%	150
I make sure to visit the "famous" sites wherever I go	66%	146
I tend to not think about my budget too much when travelling	62%	148
Luxury experiences are an important part of travel	58%	152
While I think about value for money, it doesn't tend to influence my choice of destination	56%	134
I enjoy joining guided tours to explore new destinations	47%	149
I seek travel advice from travel agencies and agents	41%	138
When traveling, I expect 24 / 7 support from a travel provider	35%	131
I seek out fine dining experiences and gourmet cuisine when I travel	34%	141

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	61%	137
To feel safe and secure	45%	112
To share quality time with others	44%	108
To have authentic experiences	43%	122
To open my mind to new perspectives	41%	130
To be proud to share my travel experiences	28%	122

DESIRED DESTINATION

	SCORE	INDEX
Authentic	50%	138
Luxurious	34%	155
Unique	31%	118
World-Class	26%	155
Charming	26%	128
Exclusive	18%	152

REFINED GLOBETROTTERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are employed full time, and some of us are retired.
- We have high incomes or are financially comfortable in retirement.
- If we are parents, our kids aren't living with us any longer. Any travel plans with them aren't restricted to school schedules.

AGE

	SCORE	INDEX
18-34	**22%**	81
35-54	**27%**	90
55+	**51%**	116
MEAN YEARS	**52.4**	116

HH INCOME (CAD)

	SCORE	INDEX
$35K or less	**10%**	53
>$35K to $105K	**70%**	131
More than $105K	**16%**	147
Refused	**4%**	107

EMPLOYMENT

	SCORE	INDEX
Employed FT	**41%**	99
Employed PT	**14%**	86
Self-employed	**6%**	106
Retired	**32%**	115

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	80
Secondary education	**22%**	92
Post-secondary education	**78%**	111

87%
134 Have a valid passport

GENDER

45% 93 Male

55% 108 Female

0% 86 Non-binary / Other

HOUSEHOLD

19% 91 Children <18 Living At Home*

12% 122 Children 18+ Living At Home*

32% 110 Children NOT Living At Home*

49% 107 No Children

** Option is not exclusive*

AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	**34%**	102
Victoria	**29%**	116
Queensland	**19%**	97
Western Austraila	**10%**	104
South Australia	**5%**	66
Tasmania	**3%**	108
Australian Capital Territory	**2%**	97

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

136

TRAVEL TRADE INDEX: **GROUP**

136

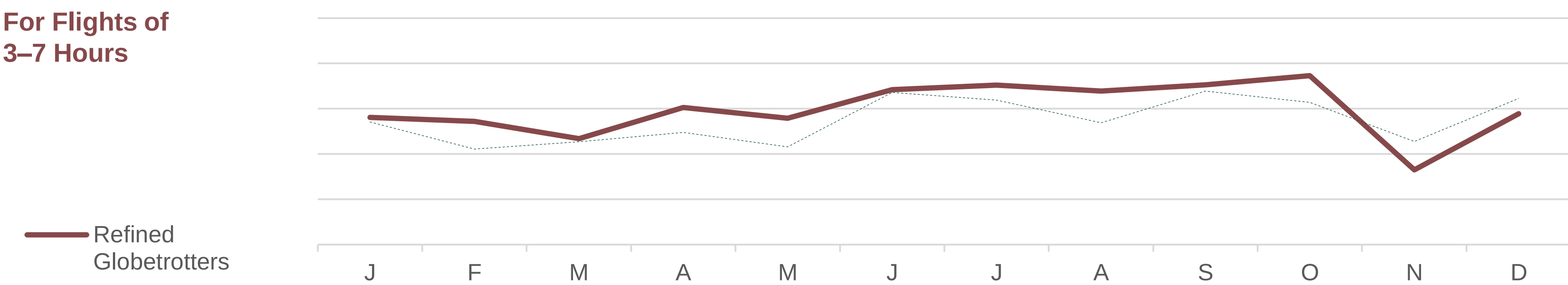
KEY terminology on this page

- **TRAVEL TRADE INDEX – NON-GROUP –** The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP –** The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

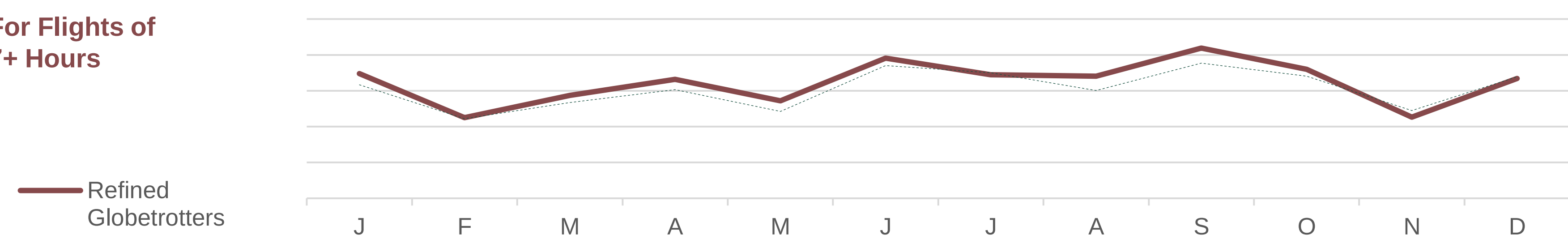
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	37%	103
3-5 Days	23%	105
1 Week Holiday	14%	107
2 Weeks Holiday	12%	123
3 Weeks Or More	6%	106

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	41%	86
International Leisure	12%	122
Business Trip	7%	97
Added Personal To Business	4%	102
Worked During Vacation	4%	98

Incidence is frequency of 2+ times per year

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**42%**	77
Premium Hotel	**34%**	145
Vacation Rental (e.g., Airbnb, Vrbo)	**19%**	81
Friend's or family's place	**18%**	67
All-inclusive resort	**15%**	151
High-end / Luxury Hotel	**15%**	154

THOUGHTS ON INDIGENOUS TRAVEL

46%

101 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

16%

115 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	**80%**	127
I really want to learn about the history of the destinations I visit	**78%**	119
I'm willing to put in the effort while travelling in order to see lesser-known places	**48%**	93
I like to explore places that are off the beaten path and less explored	**43%**	87
I'm open to travelling to destinations with limited tourist infrastructure	**34%**	79
I'm open to visiting destinations with challenging climates or weather conditions	**26%**	87

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel primarily with our partner / spouse and extended family.
- Our budgets are healthy, as travel is our priority.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**69%**	120
Adult relatives	**19%**	92
Kids	**13%**	93
Solo	**12%**	86
Friends	**9%**	96

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,680

141
INDEX SCORE

SPEND STYLE

Premium to High-end Luxury

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**63%**	113
I consider the impact that I personally have on the destinations I visit	**48%**	96
It's important to me that I visit somewhere that is open to diversity and inclusion	**42%**	92
Hearing from underrepresented communities is an important part of travelling	**38%**	104
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**28%**	96

37%

PRIORITIZE SUSTAINABLE TRAVEL

98 INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIORITIZE SUSTAINABLE TRAVEL –** The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Local cuisine and overall relaxation through wellness experiences are a priority.
- We like to explore historical cities, through guided tours or multiple stops on a cruise.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	**66%**	131
○ Museums	**47%**	139
○ Historical or archeological sites	**43%**	140
○ Visiting local monuments	**39%**	132
Local cuisine	**67%**	138
○ Local restaurants	**56%**	135
○ Luxury dining	**26%**	151
Guided tours	**45%**	145
○ City tours	**30%**	147
○ Wildlife or nature tours	**28%**	143
Overnight experiences	**30%**	140
○ Cruise	**19%**	149
○ Staying at all-inclusive resort	**14%**	151
Health and wellness	**21%**	137
○ Spas	**15%**	140
○ Meditation or yoga	**8%**	136
Nature experiences	**50%**	96
Shopping	**46%**	110
Festivals and events	**24%**	89
Family-focused attractions	**23%**	91
Water-based sports	**10%**	90
Nightlife	**10%**	89
Casual sports	**7%**	64

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	68%	105	58%	94
To escape from routine	37%	85	34%	84
To spend time with family	33%	90	41%	98
To learn through other cultures	35%	118	44%	123
For adventure and excitement	26%	93	26%	90
To check off dream travel places	23%	127	30%	118
To have fun with friends	19%	96	11%	70
For a romantic getaway	16%	109	9%	96
To be pampered	15%	131	10%	121

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	65%	130	57%	117
Visiting friends / family	43%	108	39%	99
Special event (e.g., wedding, reunion)	27%	101	22%	92
Family / friends wanted to go	27%	77	23%	86
Festival or event	11%	71	13%	77
Kids wanted to go	11%	93	11%	94

16% 93 INDEX SCORE

Travel aligns with children's school schedule

25% 97 INDEX SCORE

Take time off for vacation during major holidays

13% 74 INDEX SCORE

Difficult to take more than a few days of vacation at once

REFINED GLOBETROTTERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We book on average 5 months in advance, even for shorter distance trips.

61%

Primary Trip Planner

88
INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIMARY TRIP PLANNER –** The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF **3–7 HOURS**		FLIGHT OF **7+ HOURS**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 6.2 Months** ○ Travel agents / advisors ○ Travel review sites
	5 MONTHS BEFORE MY TRIP	
Started Researching and Planning – 4.2 months ○ Travel review sites ○ Social media		**Booked Transportation – 4.4 months** ○ Direct with company **Booked Accommodation – 4.2 months** ○ Direct with company
	4 MONTHS BEFORE MY TRIP	
Booked Accommodation – 3.8 months ○ Travel booking sites / apps **Booked Transportation – 3.4 months** ○ Direct with company		
	3 MONTHS BEFORE MY TRIP	
		Booked Activities – 2.6 months ○ Direct with company
	2 MONTHS BEFORE MY TRIP	
Booked Activities – 1.6 months ○ Direct with company ○ Travel booking sites / apps		
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips explore culture in must-see cities or small towns.
- We also take trips like Simplicity Lovers and City Trippers.

KEY terminology on this page (for additional details and definitions see Glossary)

- **SEGMENT ALIGNMENT –** The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

52% 149 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban centre		**16%**
	Small cities and town		**13%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants		**54%**
	Outdoor markets		**25%**
	Nature walks		**17%**
KEY BEHAVIOURS	Mid-range budget, seeing some bucket list landscapes, may be a cruise		

% OF TOTAL TRIPS

11% 122 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Luxury Resort		
COMPANIONS	Couple only		**52%**
	Extended family		**17%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Novel & Authentic
ACTIVITIES	Visiting famous shopping centres		**33%**
	Luxury dining		**26%**
	Street cuisine		**22%**
KEY BEHAVIOURS	Upscale all-inclusive escape with extended family		

% OF TOTAL TRIPS

14% 139 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only		**50%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		**45%**
	Oceanside beaches		**25%**
	Outdoor markets		**20%**
KEY BEHAVIOURS	Reliable couples trip to a familiar beach destination		

% OF TOTAL TRIPS

14% 136 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Alone		**31%**
	Couple only		**30%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**41%**
	Visiting famous shopping centres		**37%**
	Bars and pubs		**29%**
KEY BEHAVIOURS	Visiting friends, exploring the bustle of a city and enjoying nightlife		

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We enjoy exploring well-known and developed destinations, with access to nature, through curated experiences.
- We travel everywhere, close to home, as well as Europe, Asian countries and North America.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Australia	**49%**	85
New Zealand	**5%**	116
UK	**4%**	128
Indonesia	**4%**	118
Japan	**4%**	105

	SCORE	INDEX
USA	**4%**	115
Singapore	**4%**	134
Italy	**3%**	112
Thailand	**3%**	129
France	**3%**	100

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**44%**	129
Renowned for food and drink experiences	**42%**	139
Has famous attractions	**37%**	140
Known for stunning natural landscapes	**36%**	115
Has a variety of museums and / or historical sites	**31%**	123
Has luxury dining, shopping, and accommodations	**29%**	152
Has well-developed tourism infrastructure	**20%**	149
Offers all-inclusive resort packages	**19%**	151

REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

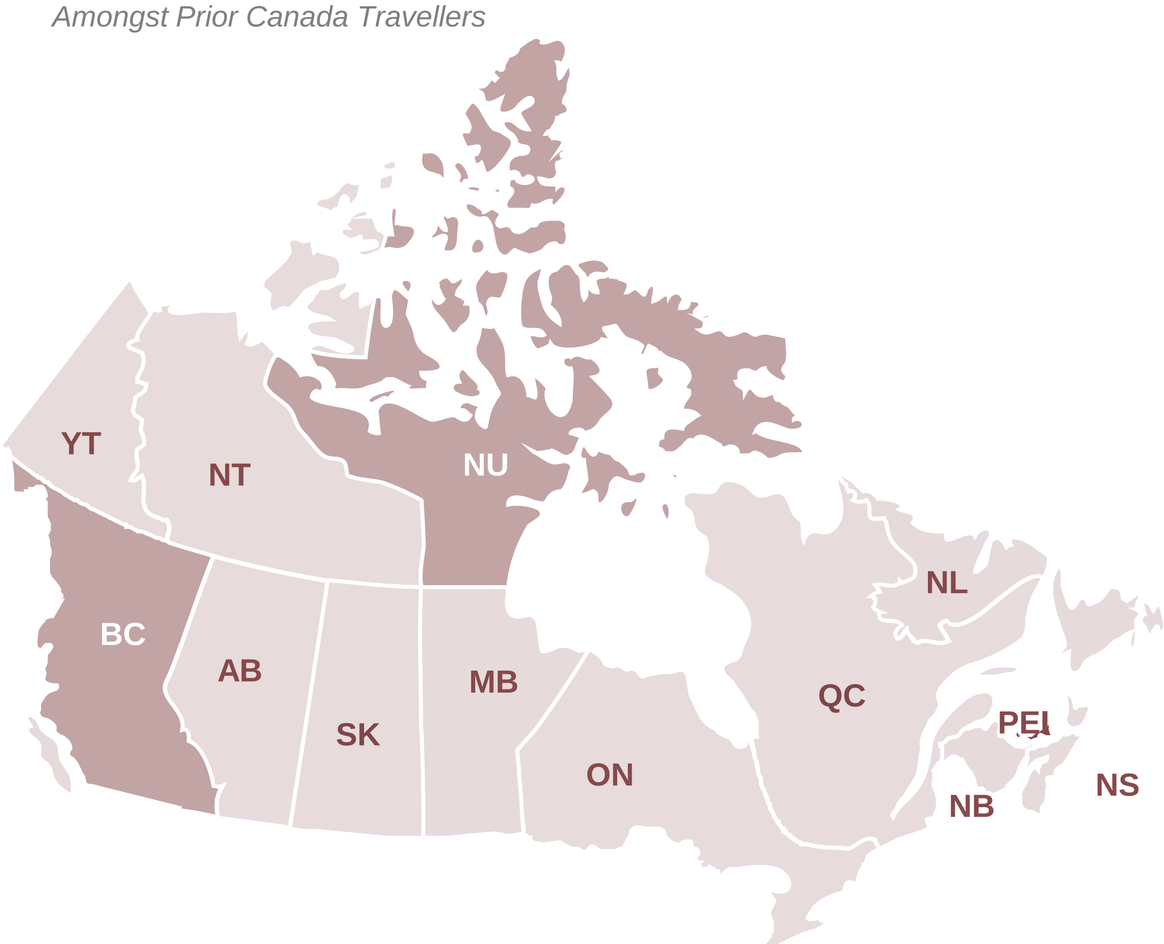
OVERALL INSIGHT

- We have likely been to Canada before, but perhaps not recently.
- We are most likely to have visited British Columbia, Ontario and Quebec.
- A future trip to Canada could include Toronto or various places in British Columbia.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	28%	89
BC	59%	116
MB	2%	80
NB	6%	96
NL	3%	85
NS	6%	70
NT	3%	94
NU	3%	118
ON	41%	112
PEI	5%	93
QC	32%	110
SK	8%	111
YT	8%	112

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- We have visited Canada in spring, summer, and fall, and have the freedom to travel in any season.
- Overall we are well informed about Canada, but may not feel we need to visit again. We are prioritizing other destinations for now.

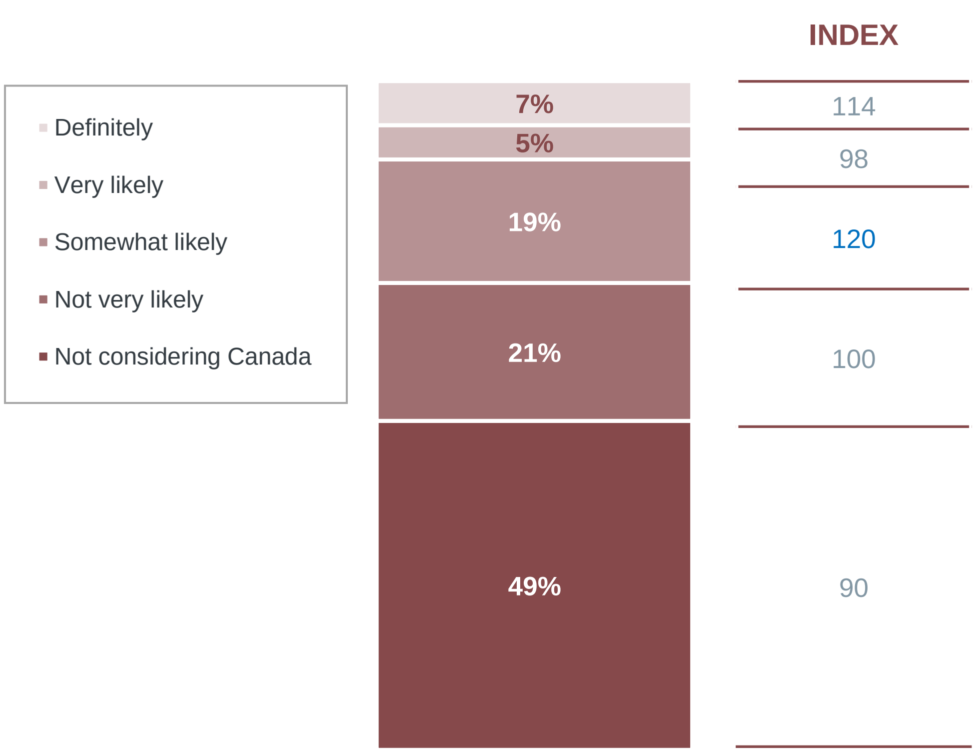
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	**15%**	**26%**	**45%**	**26%**
VS. TOTAL MARKET	22%	28%	42%	25%

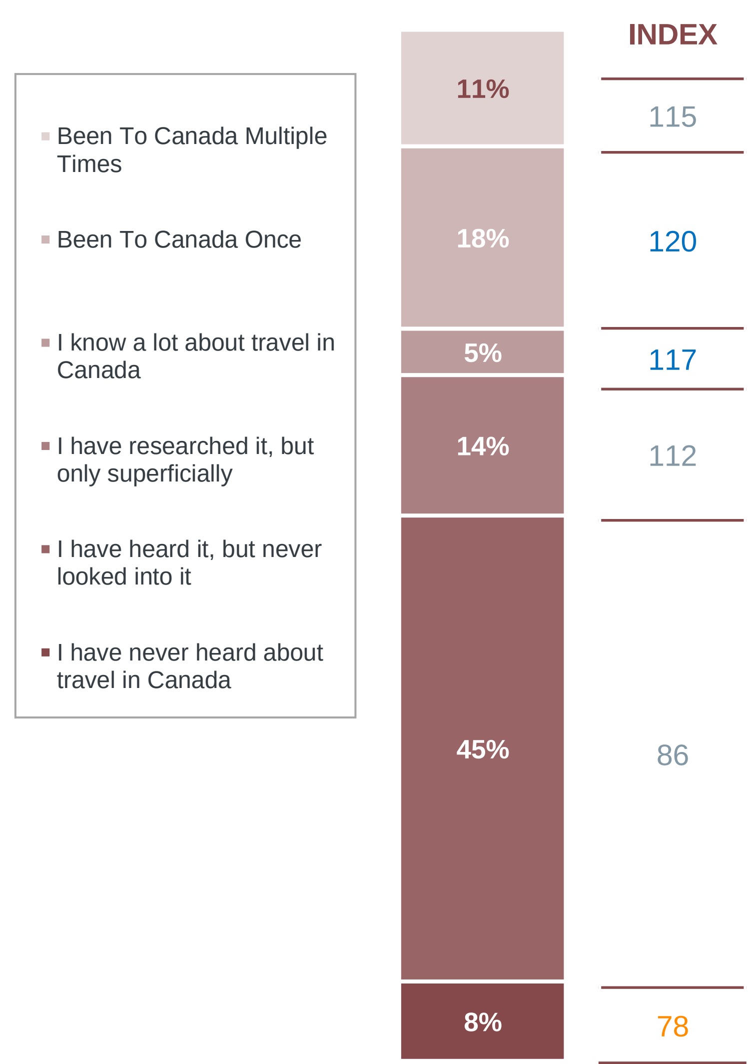
13% Been to Canada in last 5 years

109 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Our higher net worth affords us the ability to continue to invest in new, big purchases - like homes, renovations, or vehicles - and of course travel.
- If we are still working, we are established and stable in our career; we are not changing jobs.

MAJOR LIFE EVENTS IN LAST 5 YEARS

3%
Had a child
89 INDEX SCORE

27%
Started a new job / career
84 INDEX SCORE

20%
Bought a new home
125 INDEX SCORE

12%
Moved to a new city
80 INDEX SCORE

4%
Child started school
92 INDEX SCORE

42%
Purchased a car
116 INDEX SCORE

9%
Retired
118 INDEX SCORE

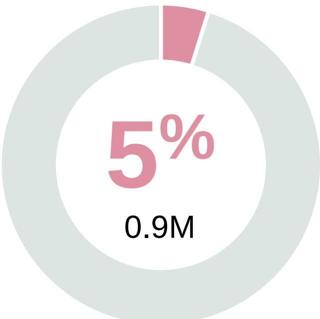
25%
Renovated house
141 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	75%	138
Savings and investments	49%	101
Personal care and wellness	40%	117
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	34%	66
Experiences (e.g., concerts, events).	33%	103
Home and decor	22%	102

PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF AUSTRALIA POPULATION

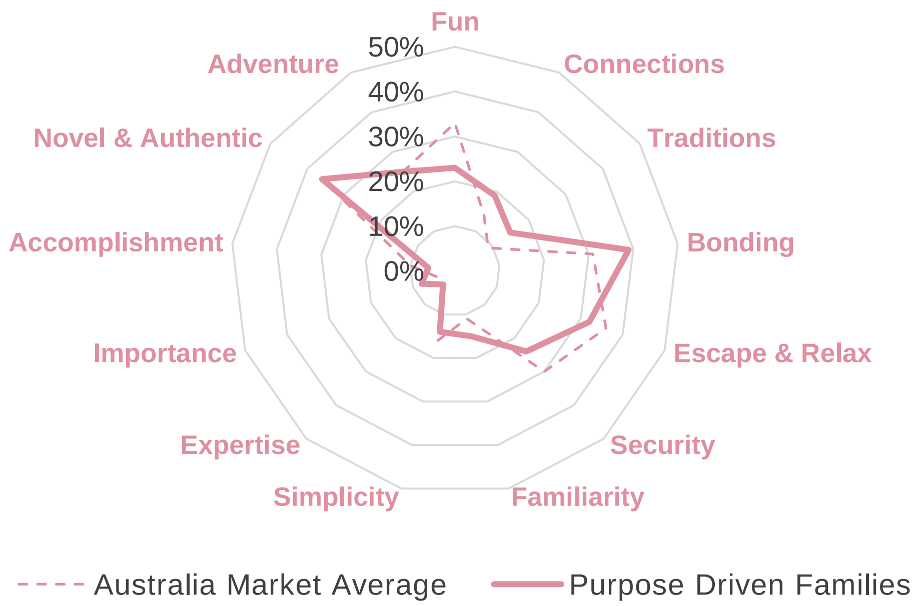
We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish trendy destinations, hidden gems that support local cultures, and anywhere that lets us spend time in nature.

Travel is both a shared accomplishment and a personal journey of learning for the entire family. Cost or difficulty aren't big deterrents; we seek socially responsible, impressive, new experiences.

WHAT YOU NEED TO KNOW ABOUT ME

1. We take pride in our destination choices, and the effort it takes to reach some destinations.
2. Being trendy for us includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.
3. We value being able to provide these experiences to our children, but we also appreciate how it allows us to demonstrate our success to others.
4. Exposure to nature, exploring the outdoors, and immersing in culture are all primary needs.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

127

How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison

TRAVELLER ECONOMIC INDEX

117

How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison

PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We value learning, engaging with local cultures, and exploring the history of our destinations.
- We use travel to bond and create creating memories, and we will tackle a few challenges to achieve that.
- We are passionate about travel, and seek free-spirited destinations that will make our friends say ’wow’.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Trying out local cuisine is a really important part of travel	**78%**	127
I like to be able to take my time at a historic site or in a museum and not feel rushed	**76%**	133
I’m passionate about travelling	**74%**	123
I am more likely to select destinations / activities that invest in socially responsible tourism	**72%**	135
I like my holiday to have some form of physical activity	**66%**	118
I generally think natural attractions are the highlights of my trip	**62%**	121
I learn the basics of a language before visiting a country / region	**58%**	126
Videos and pictures on social media inspire me to travel	**52%**	125
I’m open to unconventional accommodations when travelling	**51%**	128
I tend to not think about my budget too much when travelling	**51%**	117
I enjoy living in the moment while travelling and don’t worry much about what comes next	**49%**	125
When there’s a lot of positive buzz about a destination it makes me want to visit it more	**42%**	124
I’d be open to using AI-powered chatbots for travel planning and assistance	**32%**	130

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	**47%**	115
To bond through shared experiences	**31%**	117
To be proud to share my travel experiences	**30%**	126
To feel like a local	**19%**	123
To create new, or take part in old, traditions	**15%**	133
To feel like I’m important	**8%**	127

DESIRED DESTINATION

	SCORE	INDEX
Accepting	**26%**	119
Open	**24%**	128
Passionate	**20%**	151
Caring	**20%**	141
Free-Spirited	**20%**	123
Familiar	**15%**	111

PURPOSE DRIVEN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are parents under 55 years of age, with kids of all ages .
- We attended post-secondary education, are working full-time, and earn high incomes.

73%
103 Have a valid passport

AGE

	SCORE	INDEX
18-34	34%	114
35-54	60%	140
55+	6%	65
MEAN YEARS	38.6	67

HH INCOME (CAD)

	SCORE	INDEX
$35K or less	17%	85
>$35K to $105K	69%	122
More than $105K	11%	115
Refused	3%	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	53%	132
Employed PT	23%	133
Self-employed	6%	100
Retired	2%	64

EDUCATION

	SCORE	INDEX
Primary education or less	1%	136
Secondary education	20%	81
Post-secondary education	79%	116

GENDER

45% 93 Male

53% 104 Female

2% 155 Non-binary / Other

HOUSEHOLD

86% 140 Children <18 Living At Home*

8% 77 Children 18+ Living At Home*

3% 66 Children NOT Living At Home*

11% 62 No Children

** Option is not exclusive*

AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	34%	106
Victoria	29%	117
Western Austraila	12%	124
Queensland	12%	58
South Australia	5%	77
Tasmania	4%	146
Australian Capital Territory	4%	158

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

90

TRAVEL TRADE INDEX: **GROUP**

94

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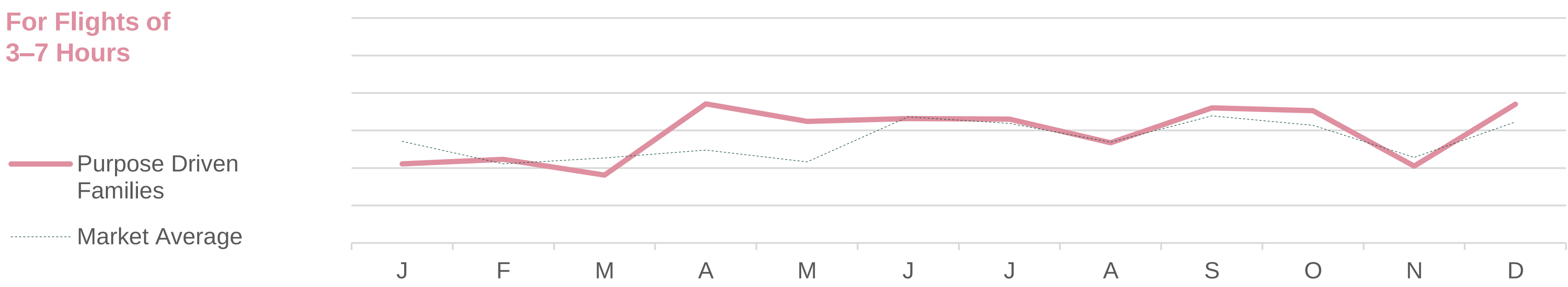
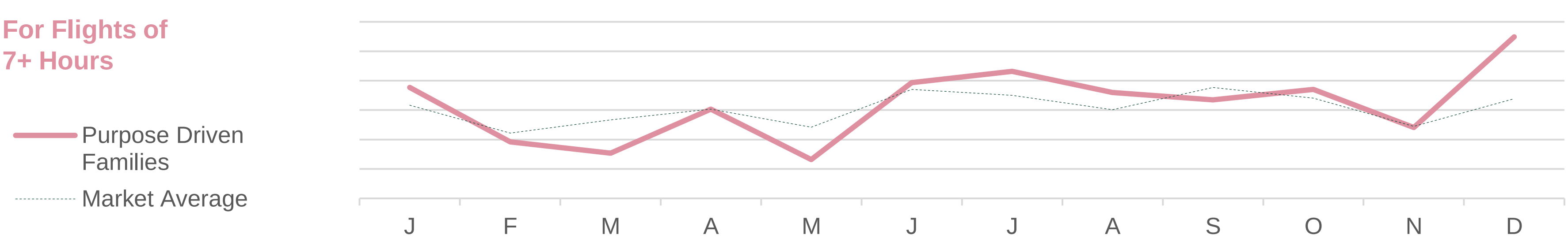
For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	43%	142
3-5 Days	22%	98
1 Week Holiday	13%	104
2 Weeks Holiday	9%	102
3 Weeks Or More	7%	113

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	48%	157
International Leisure	12%	124
Business Trip	13%	125
Added Personal To Business	7%	119
Worked During Vacation	10%	138

Incidence is frequency of 2+ times per year

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**41%**	74
Vacation Rental (e.g., Airbnb, Vrbo)	**28%**	135
Premium Hotel	**27%**	121
Friend's or family's place	**20%**	75
Campsite	**15%**	111
Budget Hotel	**14%**	114

THOUGHTS ON INDIGENOUS TRAVEL

59%

121 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

12%

98 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	**77%**	117
You only ever get to know a country by experiencing its culture	**73%**	106
I'm willing to put in the effort while travelling in order to see lesser-known places	**66%**	123
I like to explore places that are off the beaten path and less explored	**63%**	117
I'm open to travelling to destinations with limited tourist infrastructure	**57%**	120
I'm open to visiting destinations with challenging climates or weather conditions	**41%**	117

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel primarily as a nuclear family.
- Our budgets are usually mid-ranged, but spend on experiences we really value.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	75%	134
Kids	66%	136
Adult relatives	16%	74
Solo	8%	72
Friends	3%	59

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,080

121 INDEX SCORE

SPEND STYLE

Premium / Upscale

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
I consider the impact that I personally have on the destinations I visit	73%	135
It’s important to me that I visit somewhere that is open to diversity and inclusion	69%	132
It’s important for me to know that the money I spend will support the local economy I’m visiting	57%	96
Hearing from underrepresented communities is an important part of travelling	49%	122
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	48%	132

53%

PRIORITIZE SUSTAINABLE TRAVEL

125 INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIORITIZE SUSTAINABLE TRAVEL –** The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing ’sustainable travel’. Sustainable travel is defined as “travel that minimizes any negative impact on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage.”

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We like to explore outdoors off the beaten path and find wildlife to view.
- Cultural education is also important..

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	64%	131
○ Zoos or aquariums	52%	132
○ Amusement parks or theme parks	50%	136
○ Space or science centres	27%	145
Nature experiences	56%	108
○ Viewing wildlife in natural habitat	30%	118
○ Explore wilderness or backcountry	27%	130
Cultural experiences or attractions	55%	108
○ Art galleries	26%	110
○ History or culture lessons	21%	124
Water-based sports	25%	137
○ Swimming	19%	138
○ Kayaking, canoeing, or paddle-boarding	13%	138
Winter-based sports	11%	131
○ Snowboarding or downhill skiing	6%	124
○ Ice skating or hockey	4%	144
Local cuisine	50%	102
Shopping	32%	84
Festivals and events	26%	95
Overnight experiences	24%	99
Guided tours	20%	79
Health and wellness	16%	103
Casual sports	12%	94

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	53%	115	70%	131
To relax and unwind	59%	87	58%	94
To escape from routine	45%	104	50%	130
For adventure and excitement	21%	80	29%	97
To learn through other cultures	38%	125	18%	72
To have memories from top travel spots	12%	105	1%	64
To have fun with friends	9%	56	20%	121
For a romantic getaway	11%	89	6%	78
To check off dream travel places	21%	117	26%	103

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	43%	91	59%	119
Kids wanted to go	41%	128	47%	131
Family / friends wanted to go	35%	114	50%	150
Visiting friends / family	31%	66	50%	148
Special event (e.g., wedding, reunion)	25%	93	30%	121
Festival or event	20%	107	15%	84

63% 146 INDEX SCORE

Travel aligns with children's school schedule

50% 151 INDEX SCORE

Take time off for vacation during major holidays

23% 127 INDEX SCORE

Difficult to take more than a few days of vacation at once

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We are busy parents, so don't always plan in advance for short trips, but will plan a few months out for longer trips.

61%

Primary Trip Planner

85
INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIMARY TRIP PLANNER –** The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF 3–7 HOURS		FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 5.6 Months** ○ Travel guidebooks ○ Social media
	5 MONTHS BEFORE MY TRIP	
	4 MONTHS BEFORE MY TRIP	**Booked Accommodation – 3.5 months** ○ Travel booking sites / apps **Booked Transportation – 3.3 months** ○ Travel booking sites / apps
Started Researching and Planning – 3.3 months ○ Recommendations from friends or family	**3 MONTHS** BEFORE MY TRIP	
Booked Accommodation – 2.5 months ○ Direct with company **Booked Transportation – 2.5 months** ○ Direct with company **Booked Activities – 1.3 months** ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 2.5 months** ○ Travel booking sites / apps
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips explore new places and expose of us to new foods and activities.
- We also take trips like Culture Seekers and Fun & Sun Families.

KEY terminology on this page (for additional details and definitions see Glossary)

- **SEGMENT ALIGNMENT –** The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS: 13% — 132 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ● ●

TRIP TYPE	Cultural Experience		
COMPANIONS	Nuclear family with kids		**56%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Bonding	Fun
ACTIVITIES	Local restaurants		**42%**
	Visiting local monuments		**30%**
	Nature walks		**25%**
KEY BEHAVIOURS	Seeking a world-class cultural experience. Spending more for authentic experience		

% OF TOTAL TRIPS: 9% — 111 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ● ●

TRIP TYPE	Countryside & Village		
COMPANIONS	Nuclear family with kids		**67%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Nature walks		**36%**
	Local restaurants		**28%**
	Visiting nature parks or preserves		**21%**
KEY BEHAVIOURS	Staying in a vacation rental, exploring natural landscape. Our most budget-friendly trip		

% OF TOTAL TRIPS: 15% — 143 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ○ ○

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		**65%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Amusement parks or theme parks		**36%**
	Oceanside beaches		**30%**
	Outdoor markets		**28%**
KEY BEHAVIOURS	Booking in advance, all for the kids, focussed on ease and relaxation		

% OF TOTAL TRIPS: 14% — 137 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ○ ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only		**28%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Security
ACTIVITIES	Local restaurants		**44%**
	Museums		**30%**
	Visiting famous shopping centres		**29%**
KEY BEHAVIOURS	Planned in advance, spending more, visiting friends, and exploring a new culture		

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We are looking for unique hidden gems alongside trendy spots.
- Most of our travel is closer to home, but we also explore European countries.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Australia	**54%**	95
New Zealand	**5%**	116
Japan	**5%**	131
Indonesia	**4%**	88
Greece	**3%**	136

	SCORE	INDEX
Fiji	**3%**	143
India	**3%**	135
Singapore	**3%**	113
Thailand	**3%**	123
UK	**3%**	91

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	**83%**	143
Has a rich cultural and historical heritage	**36%**	115
Has famous attractions	**29%**	118
Has many hidden gems	**28%**	124
Has a variety of museums and / or historical sites	**27%**	114
Is inclusive and tolerant	**25%**	120
Provides a remote, no-frills experience	**14%**	130
Provides numerous opportunities for outdoor adventures	**17%**	109

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

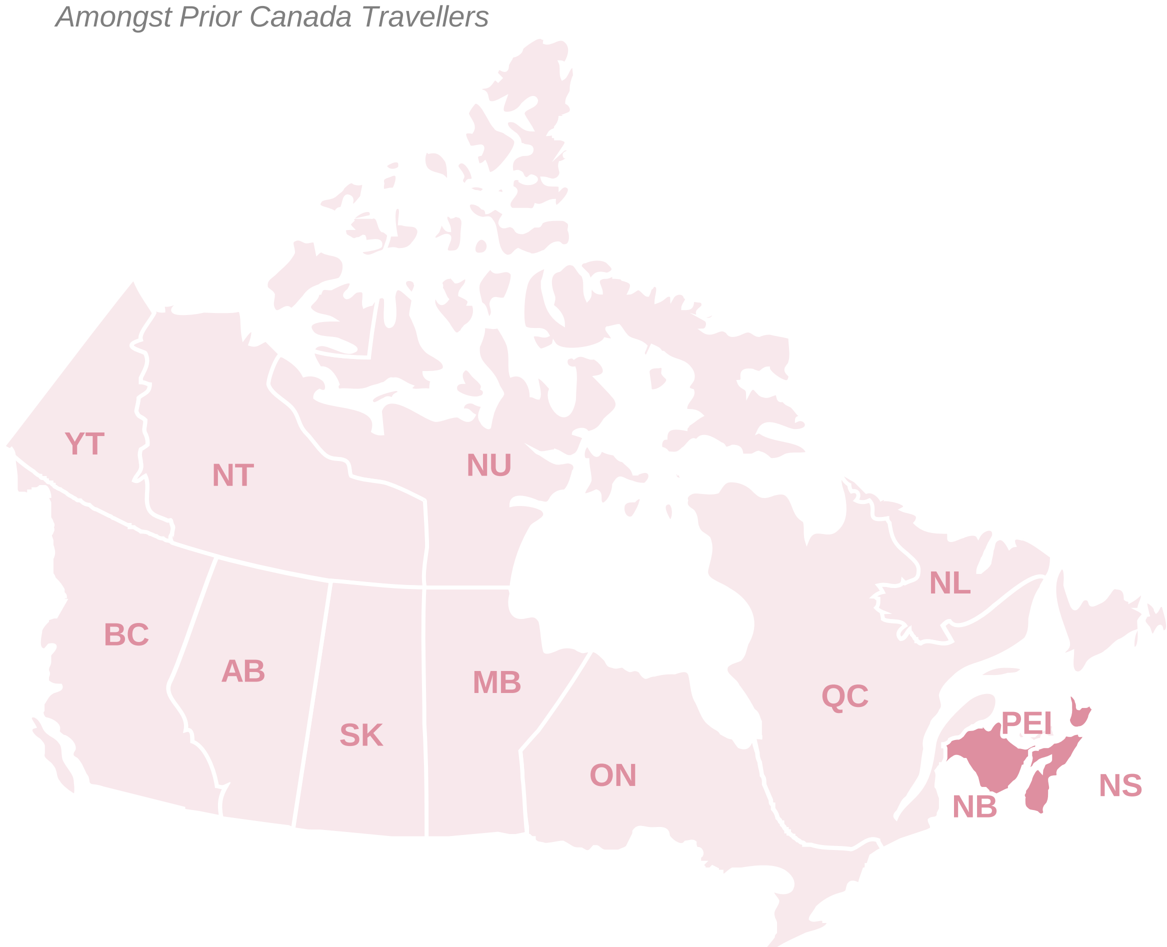
OVERALL INSIGHT

- Our top destinations in Canada so far are Ontario, Alberta and Atlantic provinces.
- Toronto and Vancouver are big cities on our list, but we are also thinking about more specific places like Niagara Falls or Whistler.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	34%	113
BC	46%	85
MB	0%	66
NB	18%	146
NL	0%	67
NS	17%	130
NT	0%	64
NU	0%	70
ON	37%	100
PEI	0%	68
QC	21%	86
SK	0%	60
YT	0%	60

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- We visit Canada near the end of winter or early spring.
- If we haven't been yet, we would like to in the next few years.
- We have good familiarity with Canada.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	**19%**	**30%**	**42%**	**26%**
VS. TOTAL MARKET	22%	28%	42%	25%

10% Been to Canada in last 5 years

98 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

	%	INDEX
Definitely	8%	124
Very likely	11%	133
Somewhat likely	17%	110
Not very likely	21%	104
Not considering Canada	43%	78

FAMILIARITY WITH CANADA

	%	INDEX
Been To Canada Multiple Times	8%	93
Been To Canada Once	7%	64
I know a lot about travel in Canada	6%	134
I have researched it, but only superficially	19%	142
I have heard it, but never looked into it	47%	95
I have never heard about travel in Canada	13%	95

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- We are in a busy time of life, with many things experiencing change. Changing careers, homes, and vehicles all take up our time and finances.
- We are also focussed on our growing and changing family, whether that means welcoming a new family member, or seeing our kids start school for the first time.

MAJOR LIFE EVENTS IN LAST 5 YEARS

23%
Had a child
127 INDEX SCORE

42%
Started a new job / career
130 INDEX SCORE

17%
Bought a new home
100 INDEX SCORE

17%
Moved to a new city
119 INDEX SCORE

22%
Child started school
127 INDEX SCORE

41%
Purchased a car
112 INDEX SCORE

1%
Retired
61 INDEX SCORE

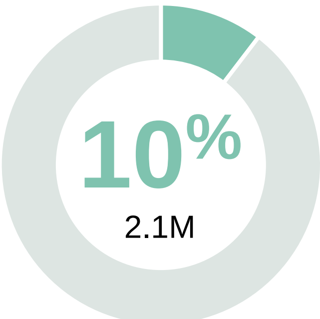
20%
Renovated house
110 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	58%	88
Savings and investments	52%	123
Personal care and wellness	42%	137
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	34%	65
Experiences (e.g., concerts, events).	31%	96
Home and decor	28%	127

CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



% OF AUSTRALIA POPULATION

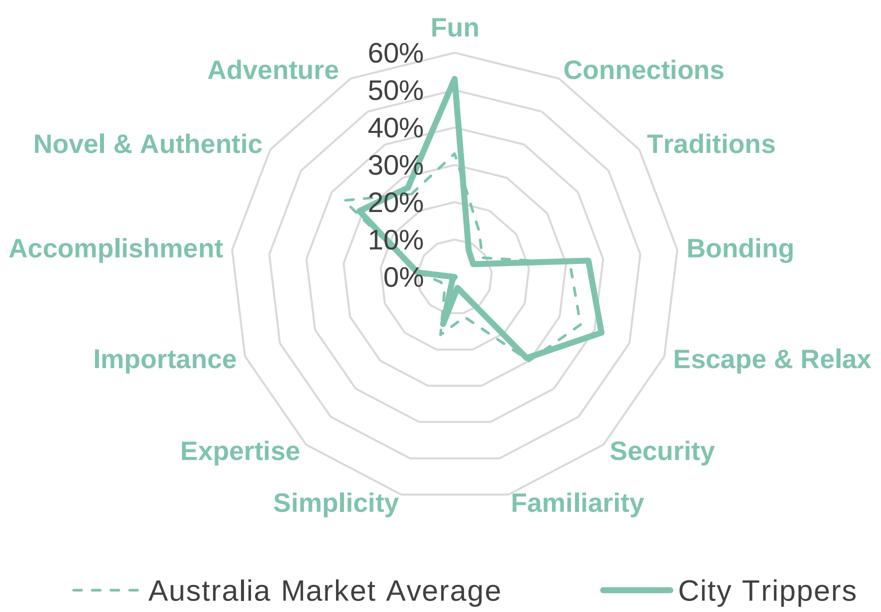
We are independent, sociable, and trendy travellers who prioritize having fun, indulging, and living in the moment. We prefer trendy, friendly locations with a variety of activities and distractions, valuing safety and ease of travel.

We relish vibrant nightlife, cultural experiences, and sharing our adventures with others. Our travel decisions focus on enjoying ourselves and creating memorable experiences with friends and loved ones.

WHAT YOU NEED TO KNOW ABOUT ME

1	We prioritize fun and social settings and seek experiences that are worth sharing on social media.
2	We like to let loose, find adventure, and forget about the day to day. If a destination garners a lot of positive buzz, it heightens our desire to visit.
3	We value simplicity in our travels, preferring destinations that are easy to maneuver and travel around in. If we can save some money even better.
4	We prefer the company of friends during travels to share experiences directly. Our travel group is generally adults only.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

80

How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison

TRAVELLER ECONOMIC INDEX

87

How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison

CITY TRIPPERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We select destinations that offer a fun, social setting, allowing us to fully indulge and live in the moment.
- We seek experiences that we can be proud of, and that we look forward to sharing with others.
- We prefer self-guided experiences in well established tourism destinations.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	88%	144
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	83%	125
I prefer destinations with well-established tourist infrastructure	70%	129
I generally stick to the most popular areas when I visit somewhere	66%	127
I generally don't think much on the impact that I personally have on the destinations I visit	65%	124
I like natural attractions but I don't usually think they are the highlights of my trip	60%	128
I love posting my trips on social media to share with friends	55%	127
I will generally not go out of my way to buy local when travelling	50%	126
Videos and pictures on social media inspire me to travel	49%	117
I'm more interested in the present and don't focus much on the history of where I visit	48%	130
When there's a lot of positive buzz about a destination it makes me want to visit it more	43%	126
I enjoy the beauty of nature without reflecting too much on its significance	42%	128
I prefer to explore quickly and cover as much ground as possible at historic sites or museums	34%	124

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	74%	136
To indulge myself and live in the moment	49%	149
To share quality time with others	47%	114
To find much-needed time to relax	45%	113
To have a fun, social setting	45%	152
To let loose and forget about day-to-day life	35%	129

DESIRED DESTINATION

	SCORE	INDEX
Fun	72%	141
Friendly	68%	115
Sociable	32%	147
Adventurous	22%	101
Carefree	20%	108
Trendy	12%	149

CITY TRIPPERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We represent a diverse age range, working full-time, earning medium to high incomes.
- Many of us are not parents, or our children are older and not living at home anymore.

AGE

	SCORE	INDEX
18-34	37%	121
35-54	31%	96
55+	32%	94
MEAN YEARS	44.7	88

HH INCOME (CAD)

	SCORE	INDEX
$35K or less	27%	128
>$35K to $105K	63%	68
More than $105K	6%	75
Refused	5%	124

EMPLOYMENT

	SCORE	INDEX
Employed FT	41%	98
Employed PT	22%	128
Self-employed	3%	61
Retired	18%	91

EDUCATION

	SCORE	INDEX
Primary education or less	0%	80
Secondary education	31%	130
Post-secondary education	69%	71

68%
92 Have a valid passport

GENDER

40% 79 Male

60% 121 Female

0% 86 Non-binary / Other

HOUSEHOLD

18% 90 Children <18 Living At Home*

11% 107 Children 18+ Living At Home*

25% 99 Children NOT Living At Home*

58% 117 No Children

** Option is not exclusive*

AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	30%	70
Victoria	26%	95
Queensland	20%	108
Western Austraila	12%	124
South Australia	8%	118
Tasmania	2%	100
Australian Capital Territory	1%	95

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

81

TRAVEL TRADE INDEX: **GROUP**

80

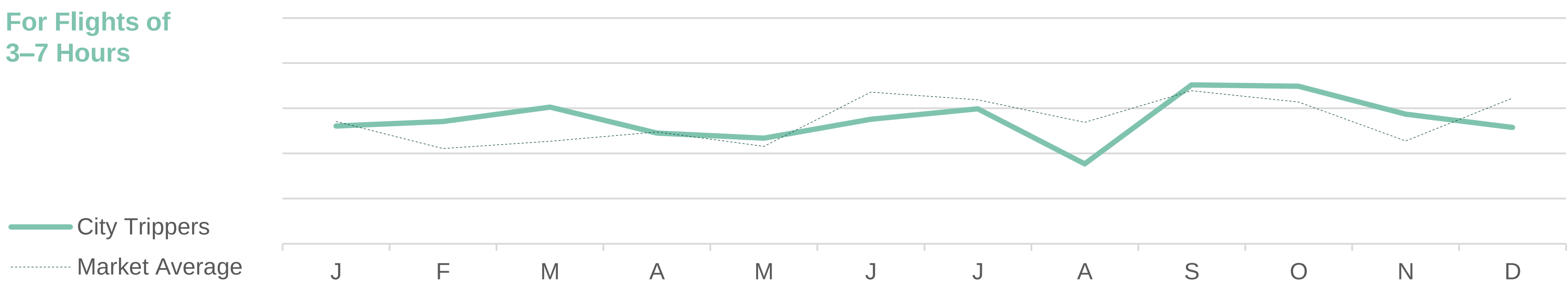
KEY terminology on this page

- **TRAVEL TRADE INDEX – NON-GROUP –** The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP –** The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

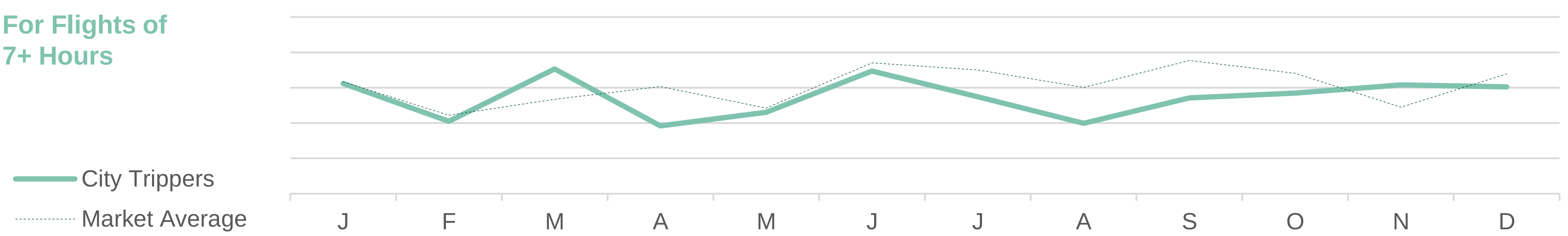
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	34%	82
3-5 Days	19%	81
1 Week Holiday	10%	84
2 Weeks Holiday	6%	79
3 Weeks Or More	2%	67

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	43%	113
International Leisure	7%	91
Business Trip	4%	80
Added Personal To Business	2%	82
Worked During Vacation	1%	81

Incidence is frequency of 2+ times per year

CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**55%**	139
Friend's or family's place	**25%**	96
Vacation Rental (e.g., Airbnb, Vrbo)	**23%**	107
Premium Hotel	**23%**	106
All-inclusive resort	**9%**	104
Cruise ship	**9%**	107

THOUGHTS ON INDIGENOUS TRAVEL

35%

83 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

11%

96 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	**72%**	103
I really want to learn about the history of the destinations I visit	**52%**	70
I'm willing to put in the effort while travelling in order to see lesser-known places	**46%**	90
I like to explore places that are off the beaten path and less explored	**34%**	73
I'm open to travelling to destinations with limited tourist infrastructure	**30%**	71
I'm open to visiting destinations with challenging climates or weather conditions	**28%**	91

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- Our travel groups are generally adults only including our partner and friends, we also take solo trips.
- Our budgets are generally focussed on value and affordability.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**53%**	82
Adult relatives	**25%**	141
Solo	**16%**	98
Friends	**15%**	134
Kids	**9%**	90

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,900

81
INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**51%**	74
It's important to me that I visit somewhere that is open to diversity and inclusion	**42%**	93
I consider the impact that I personally have on the destinations I visit	**36%**	76
Hearing from underrepresented communities is an important part of travelling	**23%**	79
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**17%**	75

25%

PRIORITIZE SUSTAINABLE TRAVEL

77 INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIORITIZE SUSTAINABLE TRAVEL –** The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We enjoy shopping, dining, and definitely explore the nightlife.
- Festivals, cultural events and concerts are our style, and we aren't really interested in winter or outdoor activities.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Shopping	61%	139
○ Outdoor markets	40%	137
○ Visiting famous shopping centres or areas	40%	141
○ Souvenir shopping	27%	139
Local cuisine	55%	112
○ Local restaurants	50%	121
○ Street cuisine	34%	119
Cultural experiences or attractions	53%	102
○ Visiting local monuments	31%	107
○ Museums	32%	92
Festivals and events	43%	133
○ Music concerts or festivals	31%	144
○ Sporting events	14%	143
Nightlife	36%	148
○ Bars and pubs	28%	146
○ Clubs and dancing	19%	146
Family-focused attractions	37%	104
Nature experiences	34%	66
Guided tours	29%	102
Overnight experiences	23%	94
Health and wellness	17%	109
Casual sports	11%	91
Water-based sports	8%	83

CITY TRIPPERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	74%	117	71%	131
To escape from routine	46%	108	53%	137
To spend time with family	36%	94	43%	100
For adventure and excitement	32%	104	33%	106
To have fun with friends	29%	139	20%	117
For a romantic getaway	16%	112	17%	141
To check off dream travel places	16%	100	22%	89
To have memories from top travel spots	10%	92	5%	77
To learn through other cultures	12%	75	18%	71

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	47%	98	44%	89
Visiting friends / family	54%	145	41%	106
Family / friends wanted to go	41%	136	33%	110
Special event (e.g., wedding, reunion)	37%	142	28%	117
Festival or event	23%	118	28%	124
Kids wanted to go	9%	91	13%	96

14% 90 INDEX SCORE

Travel aligns with children's school schedule

25% 97 INDEX SCORE

Take time off for vacation during major holidays

17% 96 INDEX SCORE

Difficult to take more than a few days of vacation at once

CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We are planners, typically thinking about trips a few months in advance

61%

Primary Trip Planner

85
INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIMARY TRIP PLANNER –** The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF 3–7 HOURS		FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	**Started Researching and Planning – 6.7 Months** ○ Travel booking sites / apps ○ Travel review sites
	6 MONTHS BEFORE MY TRIP	
Started Researching and Planning – 4.3 months ○ Travel provider websites ○ Travel booking sites / apps	**5 MONTHS** BEFORE MY TRIP	**Booked Transportation – 4.9 months** ○ Direct with company **Booked Accommodation – 3.8 months** ○ Travel booking sites / apps
Booked Transportation – 3.1 months ○ Travel booking sites / apps **Booked Accommodation - 2.8 months** ○ Direct with company	**4 MONTHS** BEFORE MY TRIP	
	3 MONTHS BEFORE MY TRIP	**Booked Activities – 3.0 months** ○ Direct with company
	2 MONTHS BEFORE MY TRIP	
Booked Activities – 1.4 months ○ Direct with company	**1 MONTH** BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Most of our trips are focussed on fun and spending time together.
- We also take trips like Simplicity Lovers.

KEY terminology on this page (for additional details and definitions see Glossary)

- **SEGMENT ALIGNMENT –** The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

11% 89 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Friends Trip		
DESTINATION TYPE	Beach resort		**29%**
	Urban centre		**17%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**36%**
	Oceanside beaches		**29%**
	Outdoor markets		**23%**
KEY BEHAVIOURS	Destination choice driven by friends, planned in advance, easy travel		

% OF TOTAL TRIPS

20% 153 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Urban Centre		
COMPANIONS	Alone		**31%**
	Couple only		**30%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**41%**
	Visiting famous shopping centres		**37%**
	Bars and pubs		**29%**
KEY BEHAVIOURS	City trip with higher budget, experiencing nightlife, focused on fun and indulgence		

% OF TOTAL TRIPS

18% 148 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		**46%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**41%**
	Visiting famous shopping centres		**19%**
	Nature walks		**15%**
KEY BEHAVIOURS	Safe and reliable couples getaway to visit friends in their small city		

% OF TOTAL TRIPS

14% 129 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only		**50%**
	Extended family		**20%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		**45%**
	Oceanside beaches		**25%**
	Outdoor markets		**20%**
KEY BEHAVIOURS	All-inclusive trip or vacation rental stay to unwind with partner and extended family		

CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek trendy locations with ease of travel, where festivals, famous attractions, an nightlife are abundant.
- Our travel spans Australia, New Zealand, Asia, and Europe.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Australia	**59%**	105
New Zealand	**5%**	116
USA	**4%**	123
Japan	**4%**	107
UK	**4%**	117

	SCORE	INDEX
Greece	**3%**	140
Indonesia	**3%**	75
Italy	**3%**	114
France	**3%**	100
Thailand	**2%**	110

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	**66%**	122
Is easy to travel around once there	**60%**	126
Renowned for food and drink experiences	**34%**	123
Language is not a barrier	**31%**	120
Has famous attractions	**30%**	122
Has vibrant nightlife and entertainment	**20%**	137
Provides a variety of local festivals and events	**17%**	111
Is a trendy destination	**11%**	137

CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

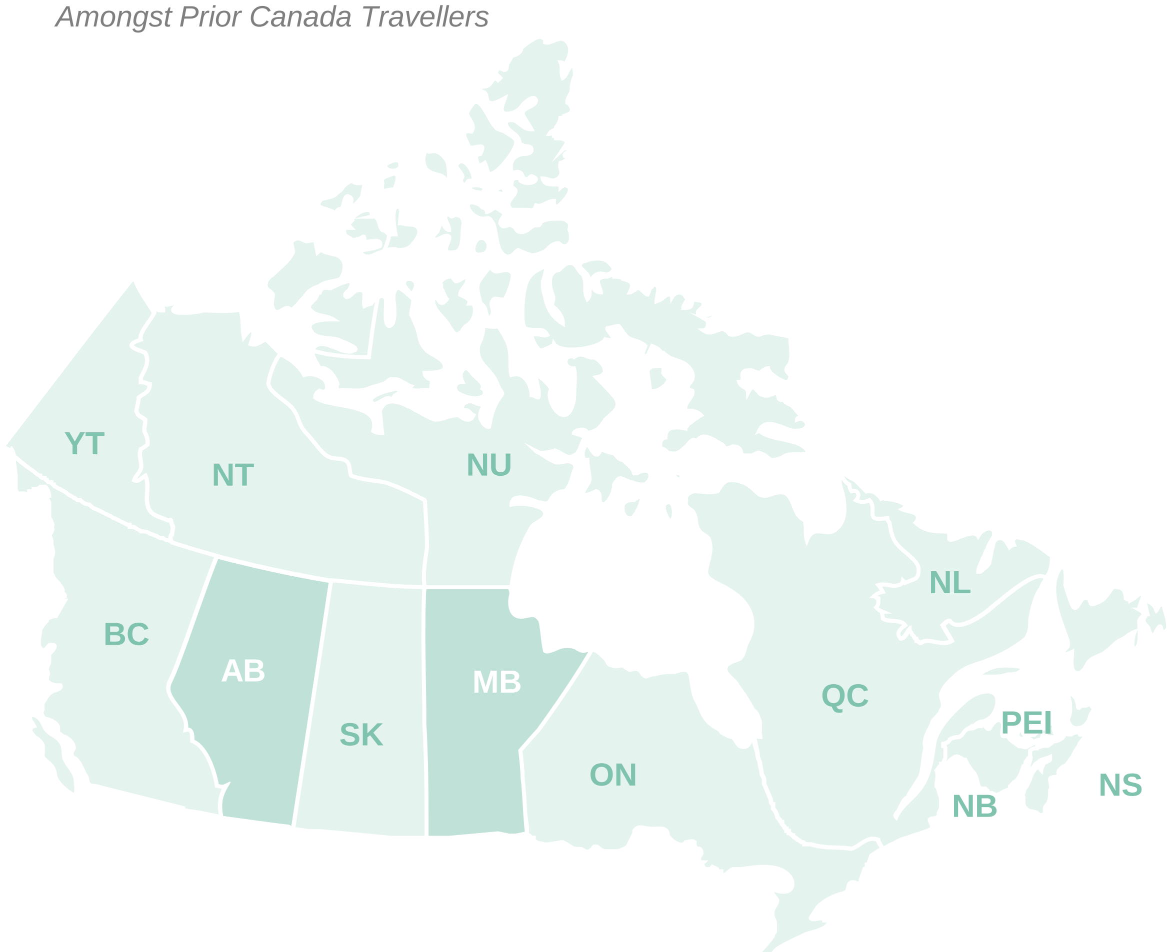
OVERALL INSIGHT

- We haven't really travelled to Canada and are unlikely to travel in the next few years.
- Top provinces visited are British Columbia, Ontario and Quebec.
- Future trip interests may be Niagara Falls and Vancouver.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	35%	122
BC	51%	97
MB	7%	116
NB	3%	84
NL	0%	67
NS	9%	85
NT	0%	64
NU	0%	70
ON	39%	108
PEI	2%	78
QC	24%	92
SK	6%	100
YT	2%	72

CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- When we have visited Canada we have travelled in the summer months.
- We don't really know too much about what Canada has to offer.

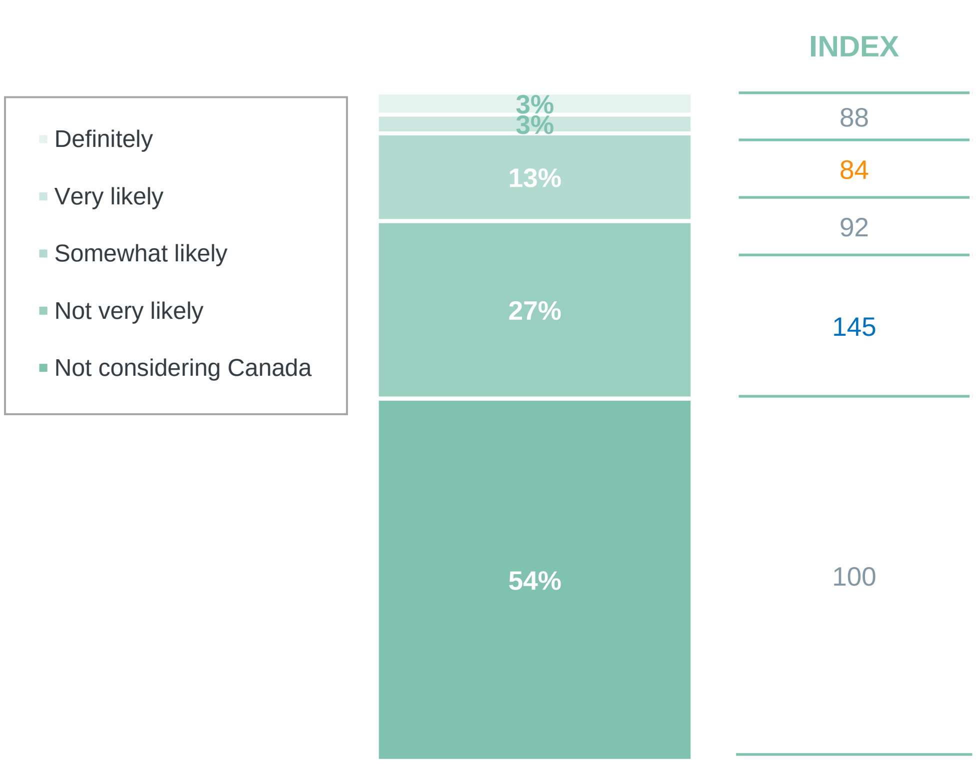
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	**18%**	**32%**	**49%**	**20%**
VS. TOTAL MARKET	22%	28%	42%	25%

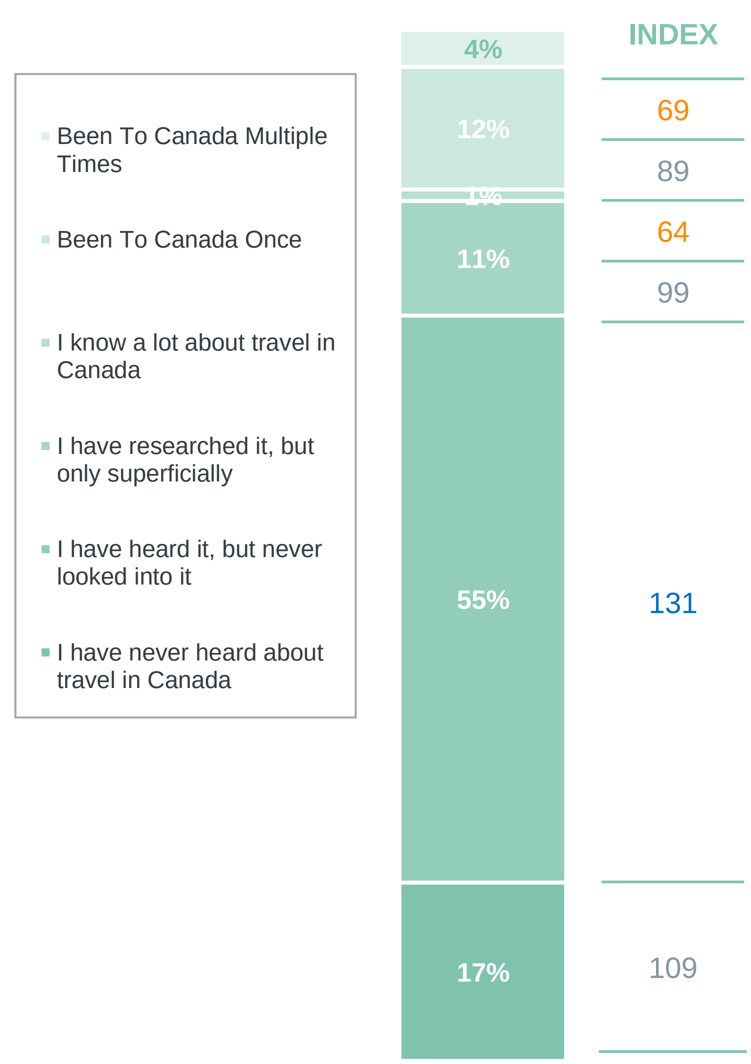
5% Been to Canada in last 5 years

77 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- In recent years we have embarked on memorable leisure travels, purchased a new car, and invested in our home.
- Some of us have started new jobs or careers, and even relocated to new cities.

MAJOR LIFE EVENTS IN LAST 5 YEARS

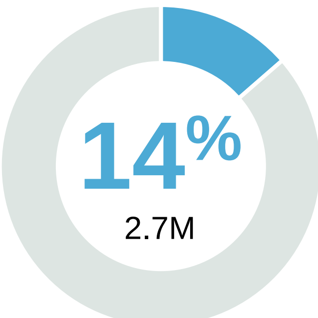
5%	Had a child	93 INDEX SCORE
41%	Started a new job / career	126 INDEX SCORE
13%	Bought a new home	74 INDEX SCORE
18%	Moved to a new city	131 INDEX SCORE
3%	Child started school	91 INDEX SCORE
34%	Purchased a car	83 INDEX SCORE
7%	Retired	103 INDEX SCORE
17%	Renovated house	89 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	58%	89
Savings and investments	45%	74
Experiences (e.g., concerts, events).	43%	141
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	41%	90
Personal care and wellness	39%	109
Fashion and accessories	30%	140

SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



% OF AUSTRALIA POPULATION

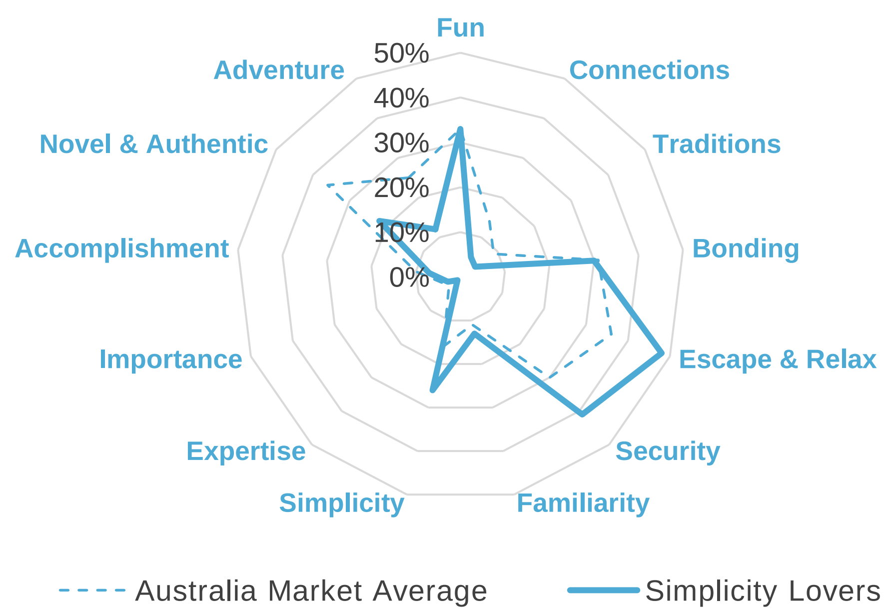
We seek peace, relaxation, and familiarity in our journeys, preferring easy and affordable destinations with a small-town feel. Prioritizing dining and nature experiences, we value simplicity and serenity.

Loyal to regular destinations, we appreciate safety and ease of travel, and while we enjoy new cultures, we often stay within our comfort zone.

WHAT YOU NEED TO KNOW ABOUT ME

1. We seek peace, relaxation, and familiarity in our travels, preferring easy, affordable destinations offering a sense of safety.
2. We like to take it slow, with low impact activities. We don't prioritize fitting in physical activity during our trips, but enjoy a quiet walk in nature to feel more relaxed.
3. Loyal to regular destinations, we are creatures of habit who favor simplicity and serenity over glitz, glamour, and cultural immersion.
4. Hard-to-reach destinations don't attract us, we don't want to worry about how to navigate or communication in a new language once we arrive.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

75

How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison

TRAVELLER ECONOMIC INDEX

68

How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison

SIMPLICITY LOVERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We are creatures of habit and seek familiar, temperate destinations.
- Prioritizing simplicity and serenity, we favor understated locales, and don't see the value of posting our travels online.
- Travel is a needed escape, we meander at our own pace, content to leave 'must-see' attractions unchecked.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Quiet, relaxed experiences are how I take care of myself on vacation	91%	142
I'm not influenced by social media content when it comes to travel	85%	151
I generally don't try to learn local languages	78%	140
I travel when I need to	71%	147
I generally don't participate in physical activities during my holidays	70%	140
While travelling I generally stick to places that are direct and convenient to get to	66%	131
I generally don't think much on the impact that I personally have on the destinations I visit	65%	124
I generally prefer to go back to the same destinations on holiday	57%	145
I seek out destinations that offer quiet opportunities for deep self-reflection	55%	133
When travelling I often go to familiar restaurants, stores, and hotels that I recognize from home	51%	138
It's not important to me that I come back from travels having learnt something new	46%	131
I don't consider travel to be an important milestone of growing up	41%	152
You can get to know a country without experiencing its culture	39%	132

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel safe and secure	57%	140
To escape the demands of everyday life	55%	131
To find much-needed time to relax	53%	128
To enjoy simple, straightforward travel	42%	150
To be familiar with my surroundings	15%	124
To feel confident travel with no surprises	13%	148

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	80%	138
Safe	74%	127
Peaceful	67%	150
Reliable	44%	144
Practical	25%	151
Familiar	24%	143

SIMPLICITY LOVERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are generally aged 55+, likely retired.
- Our monthly incomes are lower due to retirement, but our overall net worth is more comfortable.
- Find us in the Inner and Outer regions of Australia.

60% 76 Have a valid passport

GENDER

50%	108	Male
49%	93	Female
0%	95	Non-binary / Other

AGE

	SCORE	INDEX
18-34	12%	55
35-54	21%	79
55+	67%	134
MEAN YEARS	59.1	139

HH INCOME (CAD)

	SCORE	INDEX
$35K or less	26%	122
>$35K to $105K	64%	78
More than $105K	6%	77
Refused	5%	119

EMPLOYMENT

	SCORE	INDEX
Employed FT	26%	54
Employed PT	13%	79
Self-employed	6%	106
Retired	42%	134

EDUCATION

	SCORE	INDEX
Primary education or less	1%	100
Secondary education	32%	132
Post-secondary education	68%	66

HOUSEHOLD

11%	85	Children <18 Living At Home*
13%	130	Children 18+ Living At Home*
49%	135	Children NOT Living At Home*
40%	97	No Children

** Option is not exclusive*

AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	29%	66
Victoria	23%	72
Queensland	22%	116
Western Austraila	11%	118

	SCORE	INDEX
South Australia	10%	140
Tasmania	3%	116
Australian Capital Territory	2%	108

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

82

TRAVEL TRADE INDEX: **GROUP**

71

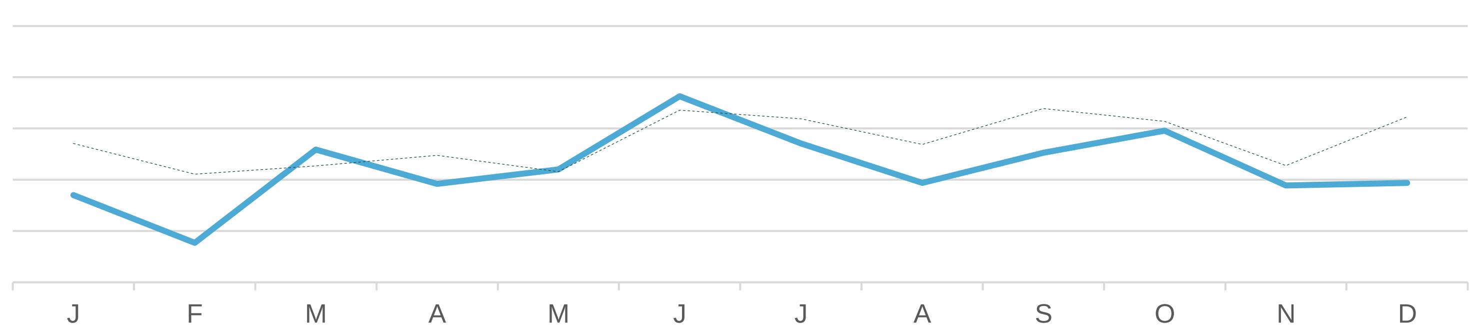
KEY terminology on this page

- **TRAVEL TRADE INDEX – NON-GROUP –** The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP –** The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

For additional definitions see Glossary

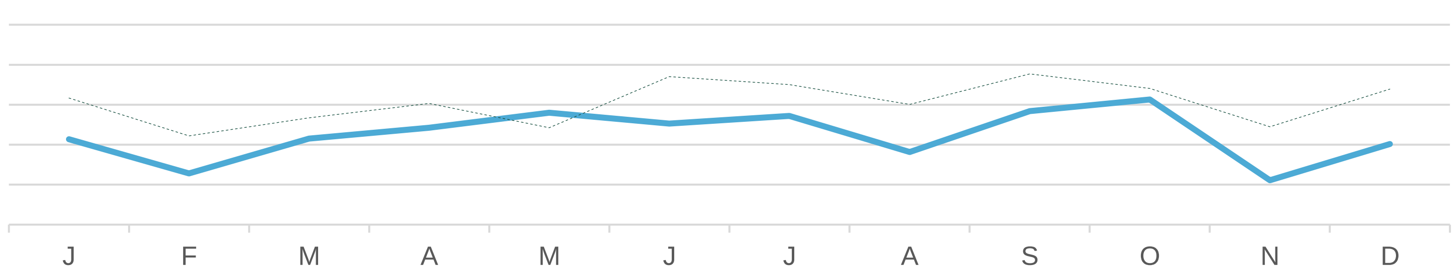
TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



Simplicity Lovers
Market Average

For Flights of 7+ Hours



Simplicity Lovers
Market Average

TRIP DURATION

		INDEX
1-2 Days	32%	66
3-5 Days	16%	69
1 Week Holiday	9%	77
2 Weeks Holiday	7%	88
3 Weeks Or More	4%	89

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	41%	88
International Leisure	5%	78
Business Trip	2%	72
Added Personal To Business	1%	74
Worked During Vacation	0%	74

Incidence is frequency of 2+ times per year

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	48%	103
Friend's or family's place	37%	142
Vacation Rental (e.g., Airbnb, Vrbo)	16%	62
Premium Hotel	15%	80
Campsite	13%	104
Cruise ship	11%	116

THOUGHTS ON INDIGENOUS TRAVEL

27%

71 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

6%

73 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	61%	68
I really want to learn about the history of the destinations I visit	58%	81
I'm open to travelling to destinations with limited tourist infrastructure	42%	94
I like to explore places that are off the beaten path and less explored	41%	83
I'm willing to put in the effort while travelling in order to see lesser-known places	34%	69
I'm open to visiting destinations with challenging climates or weather conditions	18%	70

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel primarily with our partner or spouse, sometimes with extended family.
- Our budgets are fairly conservative.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**64%**	109
Adult relatives	**22%**	114
Solo	**16%**	97
Friends	**8%**	92
Kids	**8%**	89

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,650

73
INDEX SCORE

SPEND STYLE

Value to Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**58%**	97
I consider the impact that I personally have on the destinations I visit	**35%**	76
It's important to me that I visit somewhere that is open to diversity and inclusion	**25%**	68
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**21%**	82
Hearing from underrepresented communities is an important part of travelling	**19%**	73

26%

PRIORITIZE SUSTAINABLE TRAVEL

77 INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIORITIZE SUSTAINABLE TRAVEL –** The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Our activities are low-impact and include sightseeing in nature, dining and shopping.
- We like to get outside for walks and appreciate beaches and lakes.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	55%	105
○ Oceanside beaches	30%	103
○ Nature walks	25%	89
○ See or explore lakes, rivers, or waterfalls	25%	98
Casual sports	13%	103
○ Fishing	8%	122
○ Casual biking	3%	95
Local cuisine	44%	89
○ Local restaurants	37%	91
○ Cafes or bakeries	29%	96
Cultural experiences or attractions	40%	75
○ Museums	28%	78
○ Visiting local monuments	21%	74
Shopping	36%	92
○ Outdoor markets	23%	91
○ Visiting famous shopping centres or areas	18%	85
Overnight experiences	22%	83
Family-focused attractions	23%	91
Guided tours	21%	80
Festivals and events	15%	68
Health and wellness	10%	61
Water-based sports	8%	81
Nightlife	6%	82

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	87%	144	76%	144
To escape from routine	63%	150	50%	128
To spend time with family	51%	113	43%	100
To have fun with friends	17%	90	22%	128
To check off dream travel places	9%	73	18%	76
To seek solitude and isolation	11%	115	11%	126
For a romantic getaway	10%	86	11%	111
For adventure and excitement	10%	59	10%	59
For personal reflection and growth	11%	93	10%	90

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	53%	108	58%	117
Visiting friends / family	42%	103	47%	134
Special event (e.g., wedding, reunion)	18%	66	26%	109
Family / friends wanted to go	25%	70	24%	89
Festival or event	8%	60	17%	91
Kids wanted to go	6%	87	14%	97

9% 85 INDEX SCORE

Travel aligns with children's school schedule

12% 69 INDEX SCORE

Take time off for vacation during major holidays

14% 80 INDEX SCORE

Difficult to take more than a few days of vacation at once

DESTINATION CANADA

SIMPLICITY LOVERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We generally plan, but don't need to book many items, as we are often driving distance and don't book activities.

60%

Primary Trip Planner

84
INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIMARY TRIP PLANNER –** The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF 3–7 HOURS		FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	**Started Researching and Planning – 6.5 Months** - Travel provider websites
	6 MONTHS BEFORE MY TRIP	
Started Researching and Planning – 4.9 months - Recommendations from friends or family	**5 MONTHS** BEFORE MY TRIP	**Booked Transportation – 4.8 months** - Direct with company **Booked Accommodation – 4 months** - Direct with company
Booked Transportation – 4.2 months - Direct with company **Booked Accommodation – 3.8 months** - Direct with company	**4 MONTHS** BEFORE MY TRIP	**Booked Activities – 3.5 months** - Through a travel agent
	3 MONTHS BEFORE MY TRIP	
Booked Activities – 1.7 months - Direct with company	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our trips are generally seeking comfortable weather, and familiar dining and shopping options, while avoiding crowds.
- We also take some trips like City Trippers.

KEY terminology on this page (for additional details and definitions see Glossary)

- **SEGMENT ALIGNMENT –** The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

21% 152 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only	**46%**	
	Extended family	**23%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants	**41%**	
	Cafes or bakeries	**38%**	
	Visiting famous shopping centres	**19%**	
KEY BEHAVIOURS	Likely visiting friends, which provides accommodation and decides the destination		

% OF TOTAL TRIPS

19% 147 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only	**50%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants	**45%**	
	Oceanside beaches	**25%**	
	Outdoor markets	**20%**	
KEY BEHAVIOURS	Seeking mild climate to relax. Moderate budget, staying in a hotel or all-inclusive resort		

% OF TOTAL TRIPS

51% 147 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort	**19%**	
	Small cities and town	**19%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Security
ACTIVITIES	Local restaurants	**40%**	
	Cafes or bakeries	**31%**	
	Nature walks	**17%**	
KEY BEHAVIOURS	Couples only is focussed more on exploration, could be a cruise or easy camping		

% OF TOTAL TRIPS

14% 127 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Alone	**31%**	
	Extended family	**22%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants	**41%**	
	Visiting famous shopping centres	**37%**	
	Bars and pubs	**29%**	
KEY BEHAVIOURS	Trip to visit friends in familiar city, dine out, and have fun		

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are affordable, accessible, not too crowded, and have pleasant weather.
- We take shorter trips, mostly domestic within Australia and New Zealand a little closer to home. We travel internationally every few years.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Australia	**72%**	132
New Zealand	**4%**	72
Indonesia	**4%**	106
UK	**3%**	102
Thailand	**2%**	106

	SCORE	INDEX
Japan	**2%**	62
Fiji	**2%**	104
USA	**2%**	66
Malaysia	**2%**	107
Singapore	**2%**	82

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	**74%**	134
Is easy to travel to	**65%**	139
Is easy to travel around once there	**62%**	130
Isn’t too crowded	**62%**	143
Has a mild and pleasant climate	**45%**	142
Provides a sense of personal safety	**42%**	131
Doesn’t take too long to get there	**38%**	140
Language is not a barrier	**37%**	137

SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

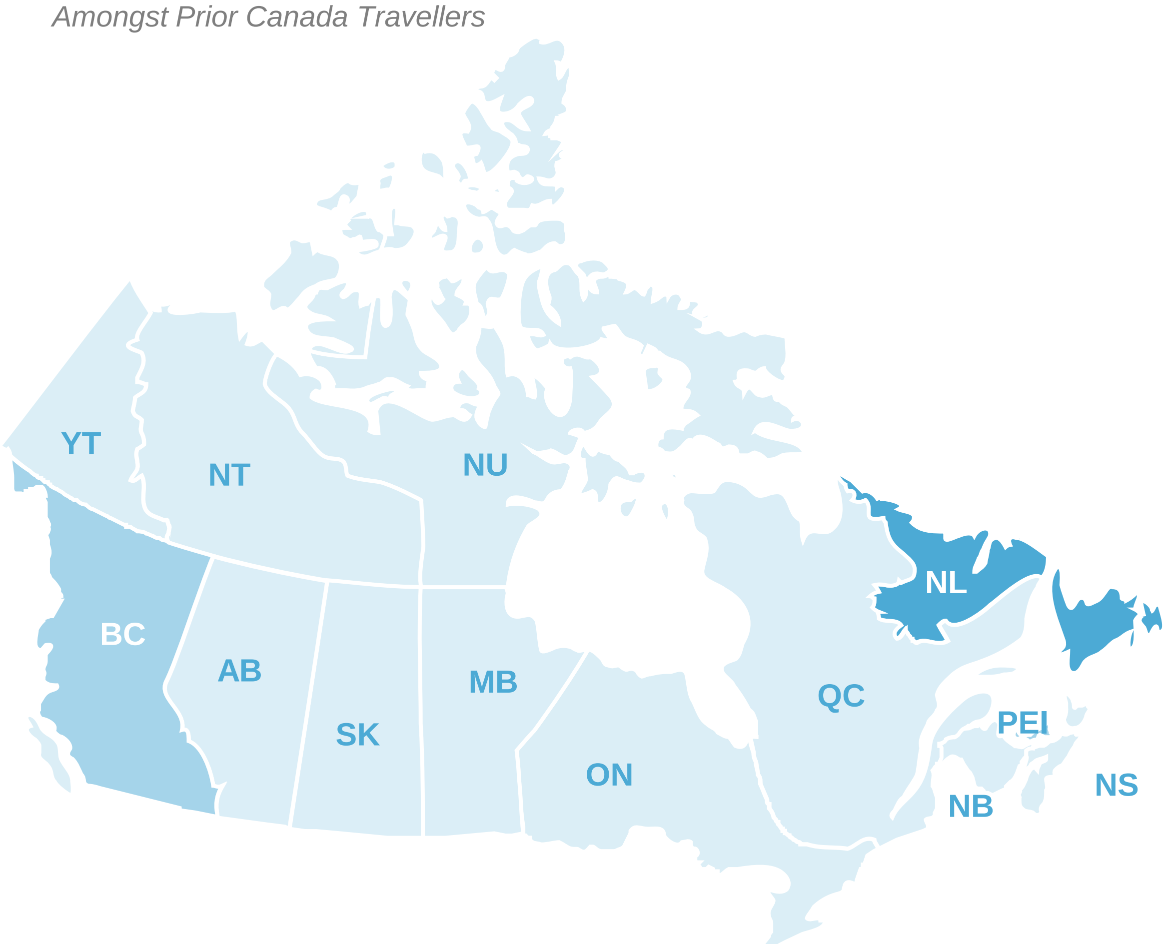
- We likely haven't been to Canada before, and don't know too much about it as a travel destination.
- Trips to date have taken us to common tourist destinations in British Columbia, Alberta and Ontario.
- A future trip could include the Rockies or other Western destination.

WHERE DO WE WANT TO GO IN CANADA

CANADIAN ROCKIES
KELOWNA
REVELSTOKE
BRITISH COLUMBIA
VANCOUVER
HALIFAX
TORONTO
QUEBEC
OTTAWA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	31%	103
BC	62%	124
MB	4%	90
NB	1%	78
NL	10%	127
NS	10%	91
NT	2%	81
NU	0%	70
ON	32%	78
PEI	5%	93
QC	26%	96
SK	3%	83
YT	8%	110

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- If we have visited, it was many years ago.
- We gravitate to the summer season to take advantage of the pleasant weather.

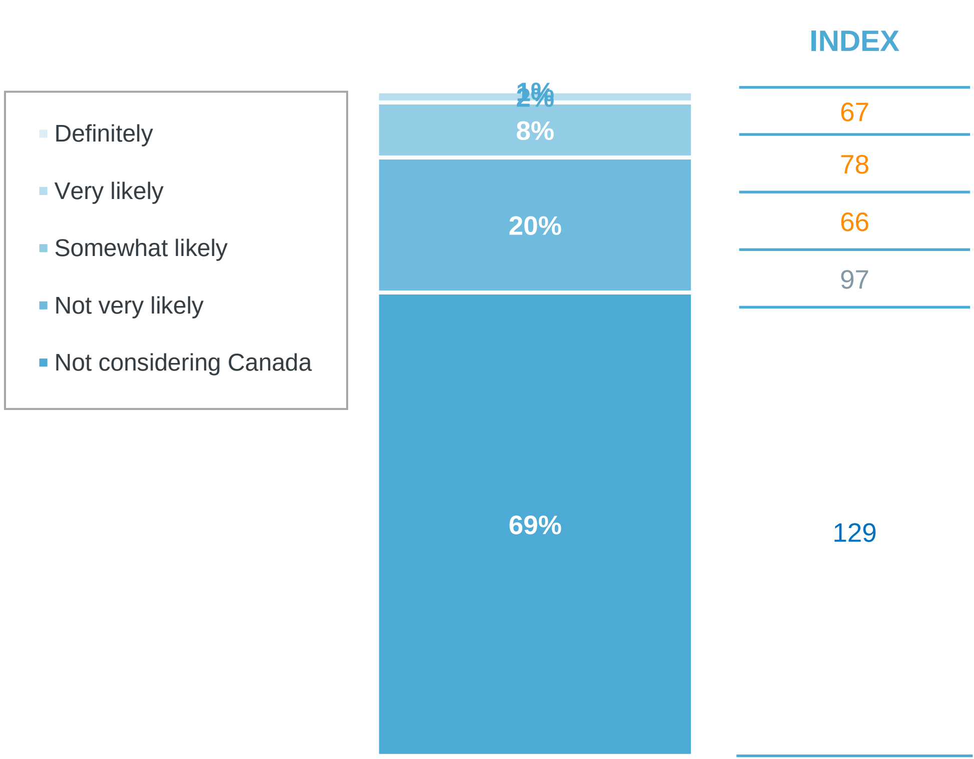
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	**14%**	**30%**	**44%**	**24%**
VS. TOTAL MARKET	22%	28%	42%	25%

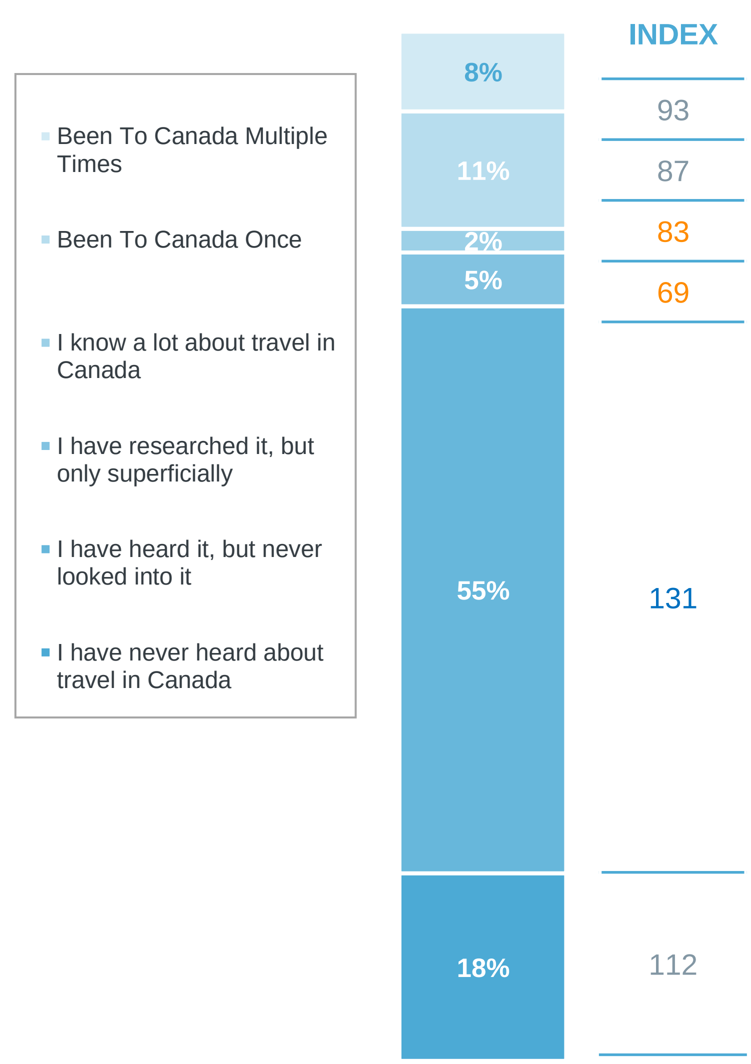
6% Been to Canada in last 5 years

81 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



SIMPLICITY LOVERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- While many of us are retired, some of us have entered this life stage recently.
- In our retirement we're prioritizing our spending on our hobbies, continuing to build our savings, and investing in our home.

MAJOR LIFE EVENTS IN LAST 5 YEARS

2%
Had a child
88 INDEX SCORE

19%
Started a new job / career
59 INDEX SCORE

14%
Bought a new home
79 INDEX SCORE

10%
Moved to a new city
62 INDEX SCORE

1%
Child started school
87 INDEX SCORE

28%
Purchased a car
59 INDEX SCORE

11%
Retired
126 INDEX SCORE

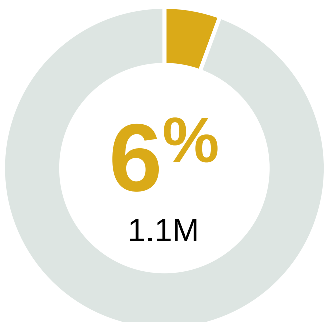
13%
Renovated house
60 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	61%	98
Savings and investments	54%	138
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	47%	114
Personal care and wellness	39%	109
Home and decor	27%	124
Experiences (e.g., concerts, events).	20%	56

FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF AUSTRALIA POPULATION

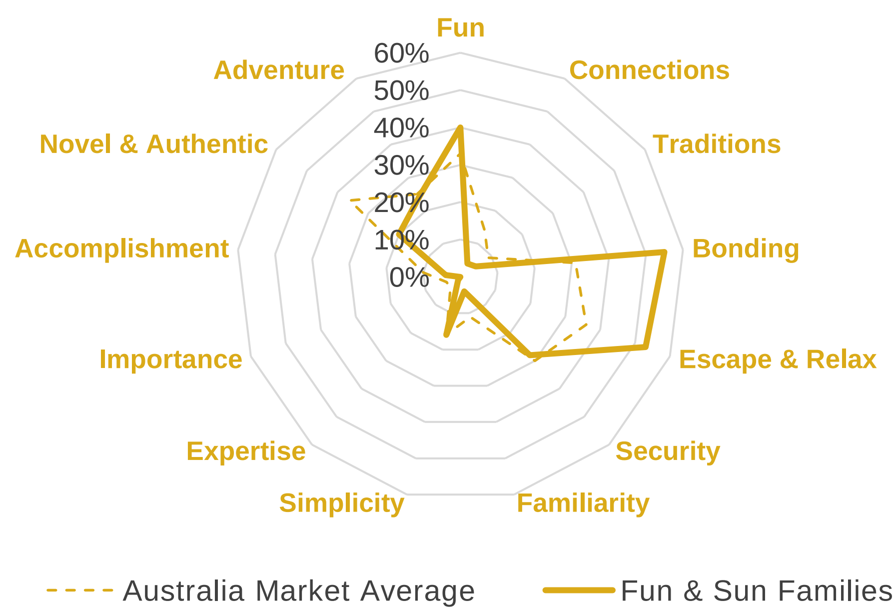
We cherish relaxation and shared family experiences in familiar, kid-friendly, and affordable destinations. We prioritize fun and simplicity over extravagance, gravitating towards well-known beaches and local spots with good communication standards.

Our big family trips are often domestic, and focus on creating lasting memories through simple, enjoyable activities guided by our children's interests.

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences. We want to get straight to family-fun.
2. Our trips are escapes from everyday life, focusing on creating lasting memories through fun and simple activities.
3. We plan our annual 1-week vacation a few months in advance, relying on booking and review sites / apps, social media and recommendations.
4. While we mostly travel within Australia and New Zealand, we dream of locations within East Asia and Pacific.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

72

How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison

TRAVELLER ECONOMIC INDEX

73

How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison

FUN & SUN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We seek comfortable, entertaining destinations to escape everyday demands and enjoy quality time together.
- Prioritizing value, convenience, and relaxation, we choose popular, easily accessible hotspots.
- We focus on the present moment, creating lasting memories through shared experiences.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer planning my trips independently and don't consult travel agencies	86%	138
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	84%	127
I generally avoid places that are challenging or difficult to reach	77%	130
I tend to choose a destination to visit based off value for money	75%	144
I appreciate diversity but not likely engage deeply with Indigenous cultures	73%	129
I generally stick to the most popular areas when I visit somewhere	66%	127
While travelling I generally stick to places that are direct and convenient to get to	64%	128
I will generally not go out of my way to buy local when travelling	55%	145
I am not more likely to select destinations / activities that invest in socially responsible tourism	55%	131
It's not important to me that I come back from travels having learnt something new	48%	136
I'm more interested in the present and don't focus much on the history of where I visit	47%	128
I generally prefer to go back to the same destinations on holiday	43%	120
You can get to know a country without experiencing its culture	39%	130

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	65%	122
To share quality time with others	62%	142
To escape the demands of everyday life	58%	139
To find much-needed time to relax	57%	135
To bond through shared experiences	49%	155
To let loose and forget about day-to-day life	39%	142

DESIRED DESTINATION

	SCORE	INDEX
Friendly	84%	144
Relaxed	76%	132
Safe	74%	127
Fun	66%	135
Carefree	25%	137
Familiar	18%	119

FUN & SUN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We likely have more than one child, spanning a range of ages.
- We are more likely to be female.
- Find us in major cities in New South Wales & ACT, and Victoria.

AGE

	SCORE	INDEX
18-34	**30%**	103
35-54	**63%**	144
55+	**6%**	66
MEAN YEARS	**40.8**	75

HH INCOME (CAD)

	SCORE	INDEX
$35K or less	**18%**	86
>$35K to $105K	**70%**	131
More than $105K	**7%**	88
Refused	**5%**	131

EMPLOYMENT

	SCORE	INDEX
Employed FT	**44%**	107
Employed PT	**23%**	134
Self-employed	**6%**	110
Retired	**3%**	65

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	80
Secondary education	**26%**	110
Post-secondary education	**74%**	92

53%
60 Have a valid passport

GENDER

31% 51 Male

69% 149 Female

0% 86 Non-binary / Other

HOUSEHOLD

95% 146 Children <18 Living At Home*

11% 107 Children 18+ Living At Home*

1% 63 Children NOT Living At Home*

4% 54 No Children

** Option is not exclusive*

AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	**35%**	116
Victoria	**32%**	143
Queensland	**15%**	74
Western Austraila	**9%**	84
South Australia	**7%**	94
Tasmania	**1%**	76
Australian Capital Territory	**1%**	90

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

63

TRAVEL TRADE INDEX: **GROUP**

69

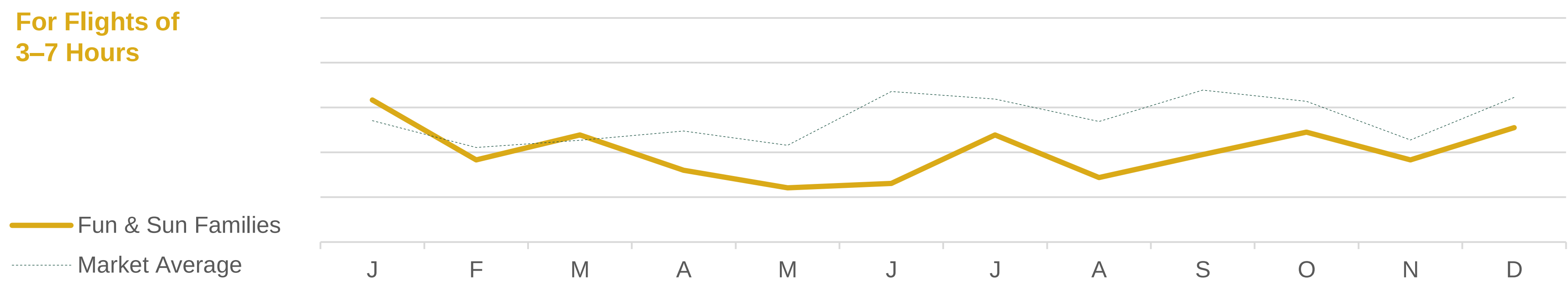
KEY terminology on this page

- **TRAVEL TRADE INDEX – NON-GROUP –** The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP –** The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

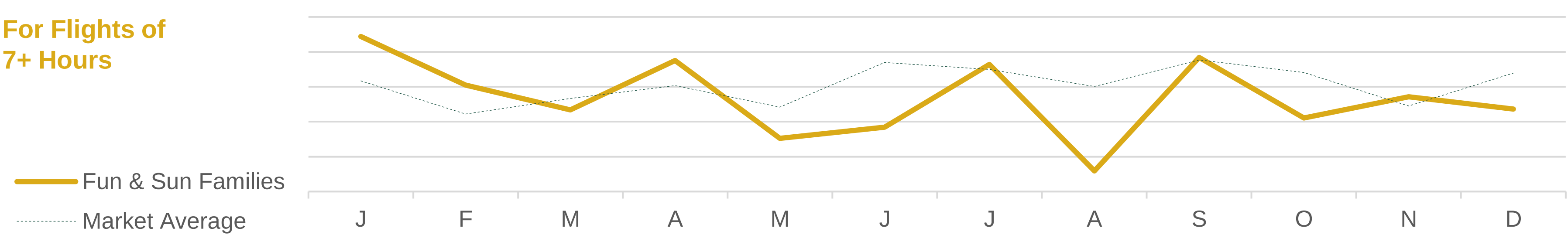
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	37%	100
3-5 Days	19%	82
1 Week Holiday	6%	59
2 Weeks Holiday	3%	53
3 Weeks Or More	1%	63

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	43%	111
International Leisure	2%	58
Business Trip	3%	75
Added Personal To Business	1%	77
Worked During Vacation	1%	77

Incidence is frequency of 2+ times per year

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**53%**	127
Campsite	**26%**	146
Friend's or family's place	**24%**	93
Vacation Rental (e.g., Airbnb, Vrbo)	**24%**	110
Premium Hotel	**17%**	88
Budget Hotel	**10%**	89

THOUGHTS ON INDIGENOUS TRAVEL

27%

71 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

3%

63 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	**61%**	70
I really want to learn about the history of the destinations I visit	**53%**	72
I'm willing to put in the effort while travelling in order to see lesser-known places	**36%**	72
I like to explore places that are off the beaten path and less explored	**34%**	73
I'm open to travelling to destinations with limited tourist infrastructure	**33%**	77
I'm open to visiting destinations with challenging climates or weather conditions	**20%**	73

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- Most of our trips include our immediate family, and sometimes include extended family.
- We keep budgets conservative.

TRAVEL COMPANIONS

	SCORE	INDEX
Kids	83%	150
Spouse / Partner	76%	135
Adult relatives	22%	118
Friends	5%	72
Solo	2%	56

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,760

77
INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	45%	55
I consider the impact that I personally have on the destinations I visit	40%	83
It's important to me that I visit somewhere that is open to diversity and inclusion	39%	88
Hearing from underrepresented communities is an important part of travelling	19%	73
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	16%	73

23%

PRIORITIZE SUSTAINABLE TRAVEL

72 INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIORITIZE SUSTAINABLE TRAVEL –** The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Family focussed attractions are the #1 priority.
- Much of our outdoor activity is spent in the water, but we also like to explore nature and go camping.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	**86%**	152
○ Zoos or aquariums	**69%**	152
○ Amusement parks or theme parks	**59%**	148
○ Space or science centres	**26%**	142
Shopping	**54%**	126
○ Outdoor markets	**38%**	131
○ Visiting famous shopping centres or areas	**35%**	128
Water-based sports	**23%**	130
○ Swimming	**18%**	137
○ Kayaking, canoeing, or paddle-boarding	**12%**	129
Nature experiences	**44%**	85
○ Oceanside beaches	**31%**	106
○ Camping	**13%**	107
Local cuisine	**38%**	77
○ Local restaurants	**33%**	80
○ Cafes or bakeries	**29%**	98
Cultural experiences or attractions	**39%**	71
Festivals and events	**26%**	94
Overnight experiences	**18%**	57
Guided tours	**17%**	71
Casual sports	**15%**	122
Health and wellness	**13%**	76
Nightlife	**6%**	80

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	86%	158	93%	157
To relax and unwind	73%	116	65%	114
To escape from routine	35%	81	46%	119
For adventure and excitement	44%	130	15%	68
To have fun with friends	23%	113	21%	122
To check off dream travel places	5%	59	9%	44
For a romantic getaway	2%	52	3%	64
To have memories from top travel spots	5%	63	21%	134
To be pampered	13%	121	2%	66

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	64%	155	73%	157
Partner / spouse wanted to go	73%	146	75%	151
Visiting friends / family	43%	108	40%	104
Family / friends wanted to go	39%	127	43%	133
Special event (e.g., wedding, reunion)	24%	90	18%	77
Festival or event	24%	123	5%	52

57% 139 INDEX SCORE

Travel aligns with children's school schedule

36% 120 INDEX SCORE

Take time off for vacation during major holidays

26% 145 INDEX SCORE

Difficult to take more than a few days of vacation at once

FUN & SUN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We plan our annual holiday a few months in advance, getting our transportation and accommodation secured.

57%

Primary Trip Planner

72
INDEX SCORE

KEY terminology on this page (for additional details and definitions see Glossary)

- **PRIMARY TRIP PLANNER –** The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF **3–7 HOURS**		FLIGHT OF **7+ HOURS**

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 6.6 months
- Recommendations from friends or family

Booked Accommodation – 5.2 months
- Direct with company

Booked Transportation – 5.1 months
- Direct with company

Booked Activities – 2.7 months
- Direct with company

TIMELINE

7 MONTHS + BEFORE MY TRIP

6 MONTHS BEFORE MY TRIP

5 MONTHS BEFORE MY TRIP

4 MONTHS BEFORE MY TRIP

3 MONTHS BEFORE MY TRIP

2 MONTHS BEFORE MY TRIP

1 MONTH BEFORE MY TRIP

MY TRIP BEGINS!

DURING MY TRIP

FLIGHT OF 7+ HOURS

Started Researching and Planning – 6.4 Months
- Online videos
- Social media

Booked Transportation – 5.0 months
- Direct with company

Booked Accommodation – 4.3 months
- Travel booking sites / apps

Booked Activities – 2.3 months
- Direct with company

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips feature beaches and destinations known for family attractions.
- We also take trips like City Trippers and Simplicity Lovers.

KEY terminology on this page (for additional details and definitions see Glossary)

- **SEGMENT ALIGNMENT –** The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

24% 157 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		**65%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Amusement parks or theme parks		**36%**
	Local restaurants		**30%**
	Swimming		**19%**
KEY BEHAVIOURS	Fun beach destination, camping or all-inclusive		

% OF TOTAL TRIPS

21% 148 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Nuclear family with kids		**70%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Nature walks		**23%**
	Zoos or aquariums		**23%**
	Amusement parks or theme parks		**18%**
KEY BEHAVIOURS	All about kids, famous attractions, vacation rental or could be camping		

% OF TOTAL TRIPS

15% 128 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only		**30%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**41%**
	Visiting famous shopping centres		**37%**
	Bars and pubs		**29%**
KEY BEHAVIOURS	Couples trip to relax. Spending a little more, dining and experiencing nightlife		

% OF TOTAL TRIPS

9% 108 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

TRIP TYPE	Suburban Experience		
COMPANIONS	Couple only		**43%**
TRIP EMOTIONAL MOTIVATIONS	Security	Bonding	Fun
ACTIVITIES	Local restaurants		**32%**
	Visiting famous shopping centres		**27%**
	Cafes or bakeries		**19%**
KEY BEHAVIOURS	Easy and affordable getaway to relax with friends at their home		

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are kid-friendly, easy to access, and offer packages to make our lives easier.
- Most of our travel is within Australia and New Zealand, a little closer to home.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Australia	77%	142
New Zealand	4%	56
Indonesia	3%	51
Japan	3%	81
USA	2%	79

	SCORE	INDEX
India	2%	105
Fiji	1%	77
Singapore	1%	66
Philippines	1%	108
UK	1%	54

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	86%	144
Is not too expensive	63%	119
Is easy to travel to	53%	122
Is easy to travel around once there	48%	106
Good connectivity (Wi-Fi, cell service, etc.)	32%	133
Doesn’t take too long to get there	28%	120
Has packaged holiday / vacation offers	22%	150
Offers all-inclusive resort packages	13%	115

FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

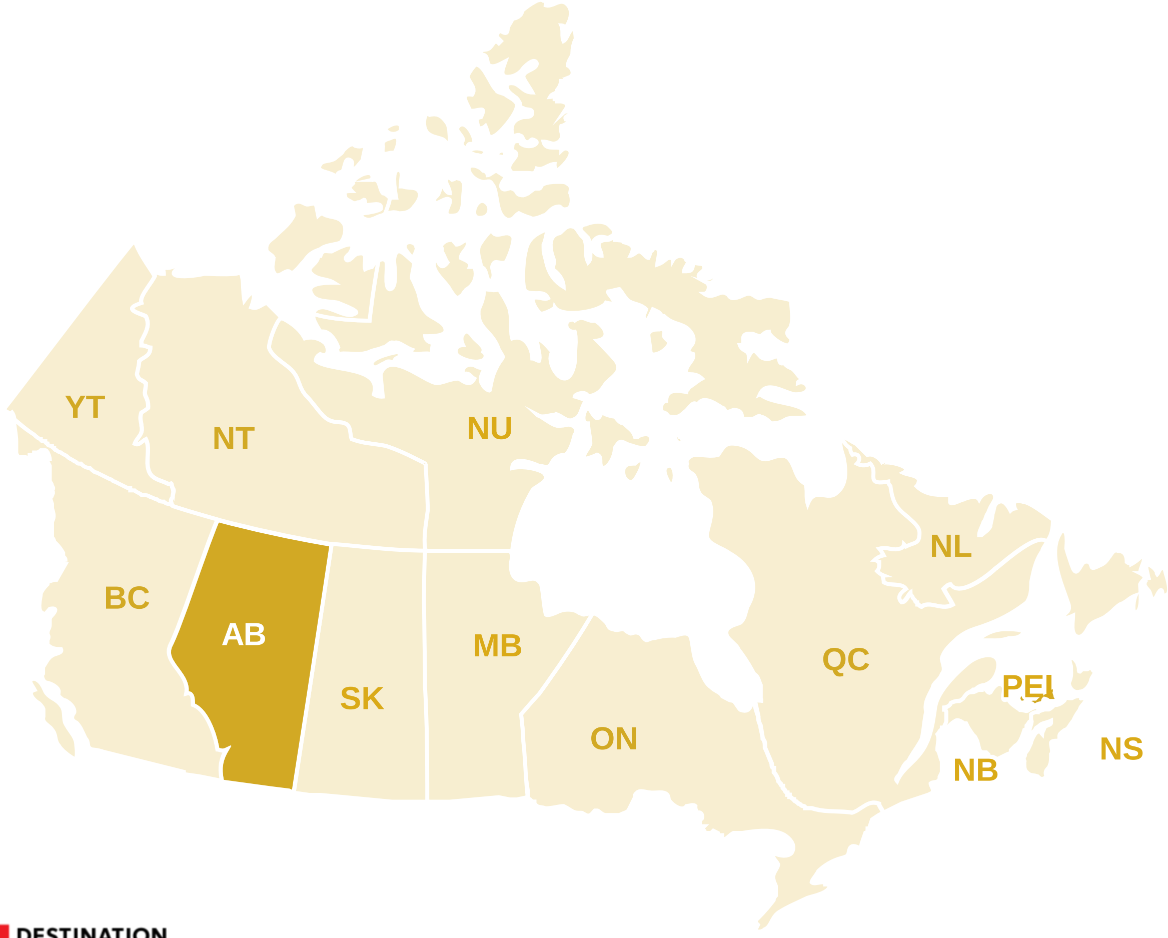
- We likely haven't been to Canada before, although we have heard about a few travel destinations and experiences.
- For those of us who have visited, it was likely to Alberta or British Columbia.

WHERE DO WE WANT TO GO IN CANADA

MONTREAL
NIAGARA FALLS
SURREY

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	44%	160
BC	32%	49
MB	0%	66
NB	0%	74
NL	0%	67
NS	7%	75
NT	5%	113
NU	0%	70
ON	22%	43
PEI	14%	141
QC	0%	36
SK	0%	60
YT	0%	60

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- When we have visited Canada, we have travelled in the winter months.
- Generally, we are not planning a future visit.

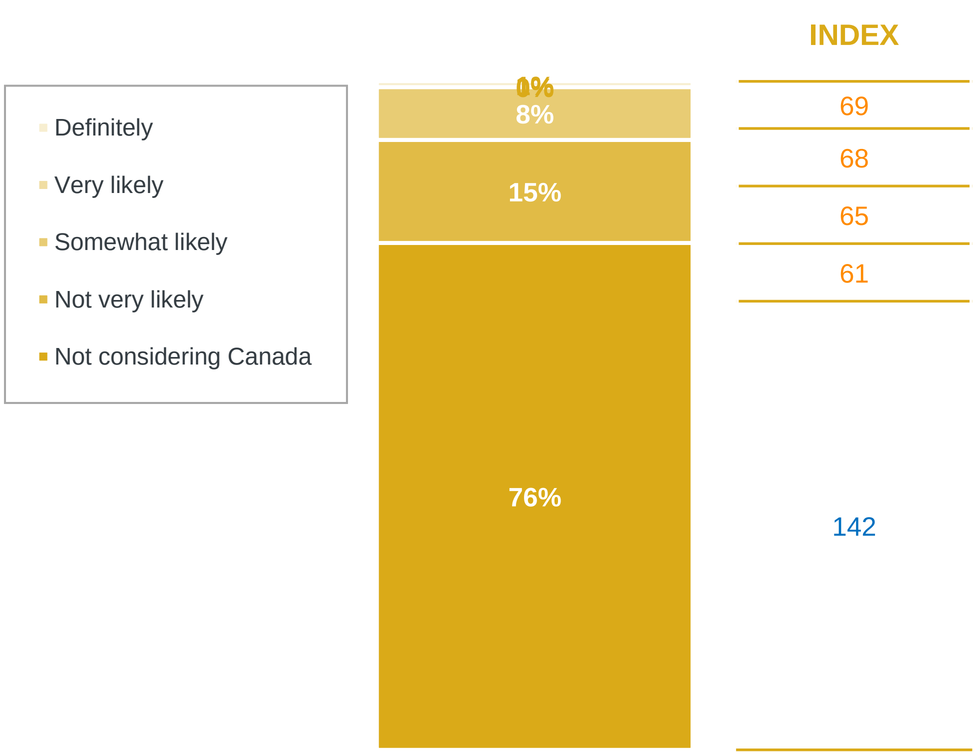
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	**56%**	**9%**	**26%**	**8%**
VS. TOTAL MARKET	22%	28%	42%	25%

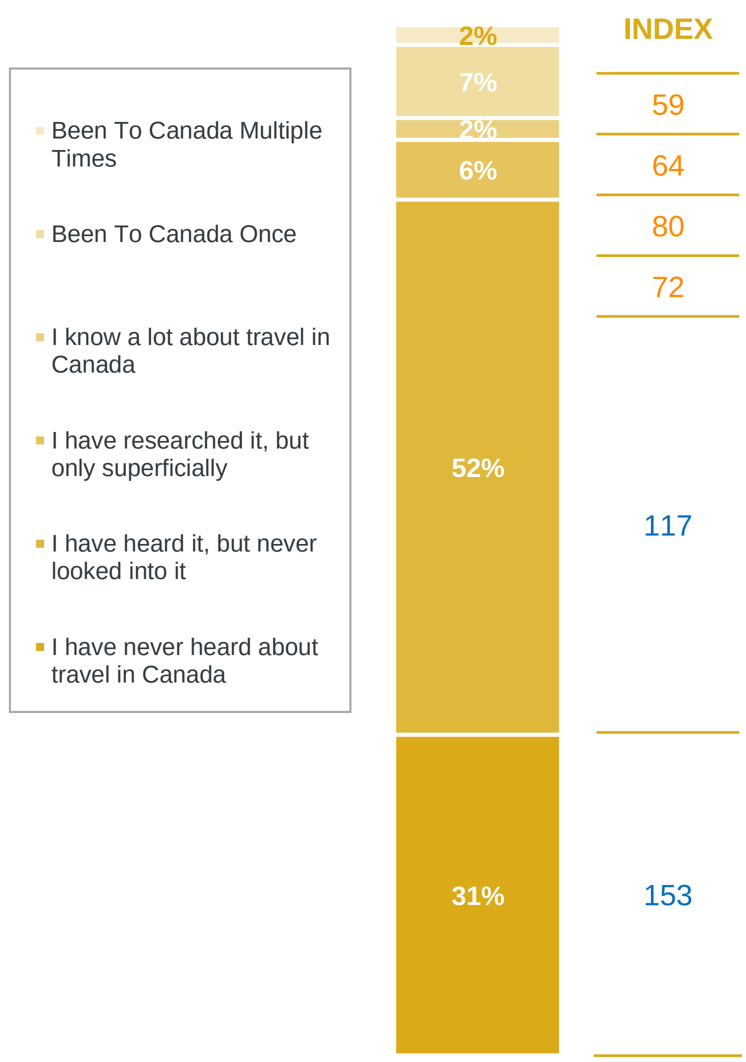
1% Been to Canada in last 5 years

60 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



FUN & SUN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- We are building our families, and the major events in our life revolve around that. This includes the big items, like a home, car, and career changes.
- If we didn't just have a child, our young children are transitioning from daycare to school life.

MAJOR LIFE EVENTS IN LAST 5 YEARS

38%
Had a child
155 INDEX SCORE

36%
Started a new job / career
111 INDEX SCORE

23%
Bought a new home
143 INDEX SCORE

13%
Moved to a new city
86 INDEX SCORE

36%
Child started school
154 INDEX SCORE

47%
Purchased a car
135 INDEX SCORE

1%
Retired
64 INDEX SCORE

17%
Renovated house
90 INDEX SCORE

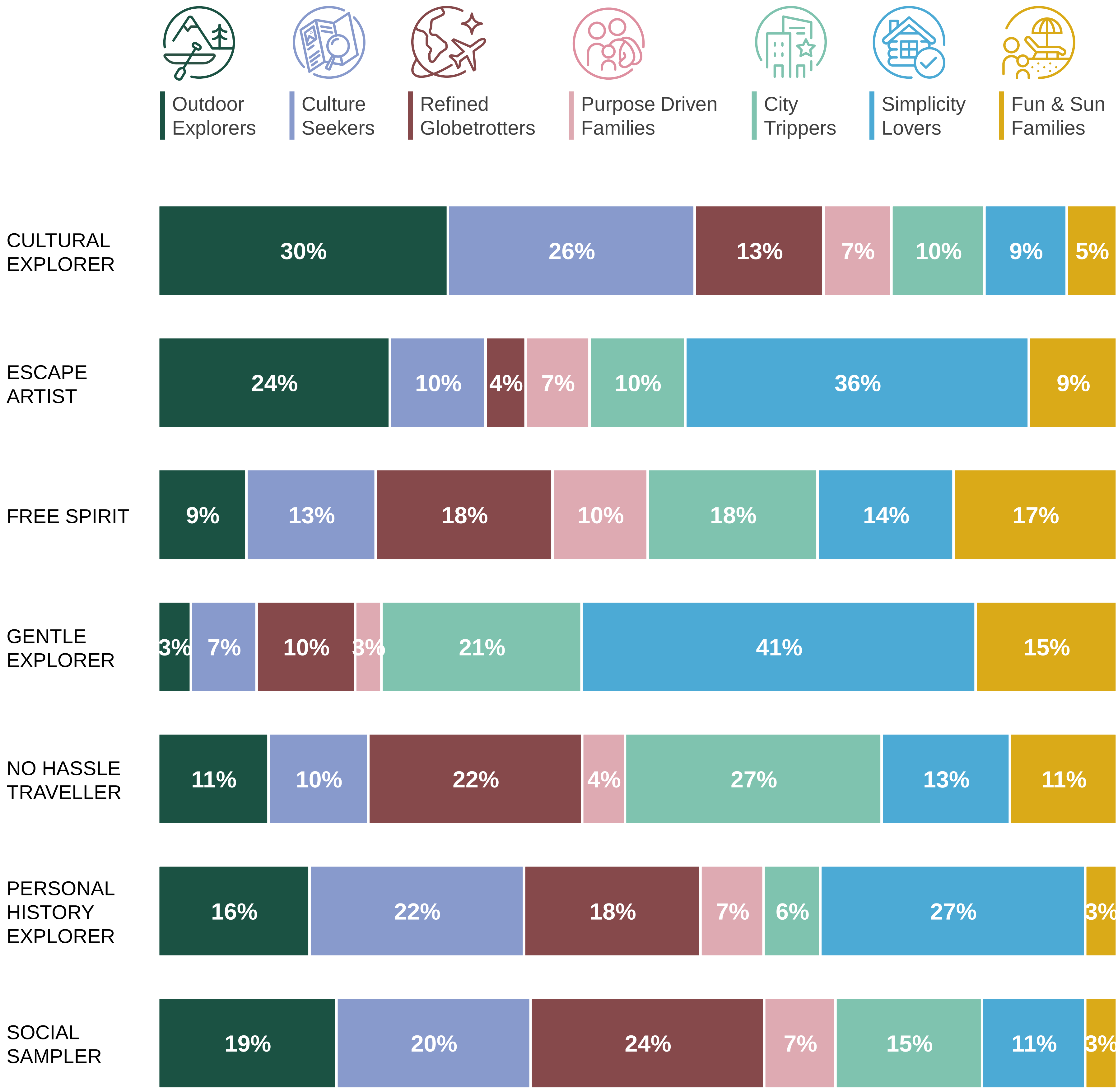
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	52%	119
Travel	46%	54
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	42%	95
Personal care and wellness	41%	125
Experiences (e.g., concerts, events).	31%	96
Home and decor	29%	134

EXPLORER QUOTIENT MAPPING

MARKET LEVEL SEGMENT DISTRIBUTION ACROSS EQ SEGMENTS

This page provides insights into how the new traveller segments disperse across historical EQ segments in this market.



GLOSSARY

DETAILS AND DEFINITIONS

DESIRED DESTINATION	How a traveller describes the personality of an ideal destination.	
DESTINATION CANADA PRIORITY SEGMENT	Traveler segments prioritized by Destination Canada for targeted marketing and strategic efforts due to the opportunity they provide to contribute significantly to the Canadian tourism landscape. Aligning with these segments enables tourism partners to effectively coordinate with the national tourism strategy and maximizing their impact.	
EMOTIONAL TRAVEL MOTIVATIONS	Key travel motivations derived from factor analysis, which condensed 25 initial statements into 13 primary motivations. These insights help industry researchers and marketers better understand travellers' emotional drivers, which may influence overall travel behaviours including the choice of destination, activities, and experiences during the journey	
EMOTIONAL TRAVEL MOTIVATION: **ACCOMPLISHMENT**	This travel motivation is about achieving personal goals and overcoming challenges during travel. These travellers seek destinations and activities that promote self-discovery and personal growth, pushing their limits to feel a sense of accomplishment.	*Statement(s) included in the motivation:* • *To feel like I've accomplished something.* • *To push my limits and challenge myself.*
EMOTIONAL TRAVEL MOTIVATION: **ADVENTURE**	This travel motivation is about seeking thrill and excitement through adventurous activities. Travellers who seek adventure are often energized by a physical and emotional rush and they often proudly share their experiences with others.	*Statement(s) included in the motivation:* • *To have experiences I am proud to tell others about.* • *To feel a sense of adventure.*
EMOTIONAL TRAVEL MOTIVATION: **BONDING**	This travel motivation focuses on spending quality time with travel companions, particularly partners and family members. Travellers motivated by bonding cherish creating lasting memories through shared experiences with their loved ones.	*Statement(s) included in the motivation:* • *To share quality time with others.* • *To bond and create lasting memories through shared experiences.*
EMOTIONAL TRAVEL MOTIVATION: **CONNECTIONS**	This travel motivation is about building relationships and forming connections with new and interesting people. Travellers motivated by connections look for opportunities to engage with locals or other visitors on their travels.	*Statement(s) included in the motivation:* • *To feel connected with new people.*
EMOTIONAL TRAVEL MOTIVATION: **ESCAPE & RELAX**	This travel motivation signifies a desire to escape daily routines and simply relax during vacation. Travellers motivated by escape and relax often seek solitude, tranquility, and rejuvenation in peaceful destinations.	*Statement(s) included in the motivation:* • *To escape the demands of everyday life.* • *To find much-needed time to relax.* • *To let loose and forget about day-to-day life.*

GLOSSARY

DETAILS AND DEFINITIONS

EMOTIONAL TRAVEL MOTIVATION: **EXPERTISE**	This travel motivation is about influence, status, and confidence. Travellers with this motivation like to be well versed in travel opportunities, so they can confidently navigate new environments, and take pride in being the expert among their peers	*Statement(s) included in the motivation:* • *To feel like a travel expert.*
EMOTIONAL TRAVEL MOTIVATION: **FAMILIARITY**	This travel motivation encompasses a diverse range of travellers looking for familiarity during their travels. Some seek the comfort of recognizable destinations and routines, enjoying the predictability of repeat travel. Others aim to immerse themselves in new places while feeling like they are not tourists, blending in and experiencing the local culture as if they were natives.	*Statement(s) included in the motivation:* • *To be familiar with my surroundings.* • *To feel like a local.*
EMOTIONAL TRAVEL MOTIVATION: **FUN**	This travel motivation is centered around the pure enjoyment of travel. The travellers motivated by fun prioritize activities and destinations that bring happiness and a sense of playfulness. They focus on living in the moment, indulging in joyful experiences, and seeking vibrant, social environments.	*Statement(s) included in the motivation:* • *To just enjoy myself and have fun.* • *To indulge myself and live in the moment.* • *To have a fun, social setting.*
EMOTIONAL TRAVEL MOTIVATION: **IMPORTANCE**	This travel motivation is about the desire to feel important and admired. Travellers motivated by importance often choose popular, exotic, and luxury destinations to reflect their success and gain recognition.	*Statement(s) included in the motivation:* • *To feel like I'm important.*
EMOTIONAL TRAVEL MOTIVATION: **NOVEL & AUTHENTIC**	This travel motivation is driven by a desire for novelty in all its forms—new places, unique experiences, and fresh perspectives. The travellers motivated by novel and authentic seek orgiginality in their journeys, immersing themselves in different cultures and engaging in genuine and authentic interactions.	*Statement(s) included in the motivation:* • *To have authentic experiences.* • *To open my mind to new perspectives.* • *To explore and discover new things and places.*
EMOTIONAL TRAVEL MOTIVATION: **SECURITY**	This travel motivation is around prioritizing safety and predictability. Travellers motivated by security prefer well-planned trips, reliable accommodations, and destinations known for their safety.	*Statement(s) included in the motivation:* • *To feel welcomed.* • *To feel safe and secure.*

GLOSSARY

DETAILS AND DEFINITIONS

EMOTIONAL TRAVEL MOTIVATION: **SIMPLICITY**	This travel motivation is about appreciating straightforward and easy travel experiences. Travellers motivated by simplicity prefer simpler trips with laid back itineraries and no surprises.	*Statement(s) included in the motivation:* • *To enjoy the simplicity of easy, straightforward travel.* • *To feel confident of no surprises; I'll get exactly what I expected.*
EMOTIONAL TRAVEL MOTIVATION: **TRADITIONS**	This travel motivation is about seeking to engage in traditions, whether by a traveller participating in local cultural practices or creating their own travel traditions with family and friends.	*Statement(s) included in the motivation:* • *To create new, or take part in old, traditions.*
FUNCTIONAL BENEFITS	Functional needs in travel pertain to the practical aspects necessary for a trip. These include affordable pricing, convenient transportation, comfortable accommodation, and reliable services. These needs are often about the logistics and practicalities of travel, ensuring the trip runs smoothly	
NON-TRAVELLER	Has not travelled a minimum of one night away in paid accommodation in past 5 years OR is actively planning to travel in next 2.	
PRIMARY TRIP PLANNER	The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.	
PRIORITIZE SUSTAINABLE TRAVEL	The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage.	
SEGMENT ALIGNMENT	Indicates how closely personal needs, motivations and travel behaviours on a specific trip type (e.g. long-haul trip, short-haul trip, family vacation, weekend getaway) align with the overall travel needs, motivations and behaviours that define the segment. For example, a travellers' personal needs (motivations and ideal trip specifics) may fully influence and define a long-haul trip to a bucket-list destination; however, these needs may not be a priority on a quick getaway with friends. This score provides insights into when traveller needs and behaviours shift by trip type and should be considered when targeting this segment for this type of trip	
SHORT / MID / LONG HAUL	Short Haul: Those who did not travel via flight or travelled on a less than 3 hours flight Mid Haul: Those who travelled on a 3 to 7 hours flight Long Haul: Those who travelled or 7+ hours flight	

GLOSSARY

DETAILS AND DEFINITIONS

TRAVELLER ECONOMIC INDEX	An industry metric providing insight into a segment's propensity to have a positive impact on Canada's tourism economy. The score is derived from a selection of variables from the initial study that most represent a positive impact on the tourism economy. The included variables cover economic means, typical trip recency and frequency, propensity towards more luxury travel behaviours, and details about travel specifically to Canada. To reduce market specific bias and any variation in score composition across markets, the score is reported as an index
TRAVELLER RESPONSIBLE INDEX	An industry metric providing insight into a segment's alignment with Canada's responsible travel values. The score is derived from a selection of variables from the initial study that most represent responsible travel. The included variables cover traveller values across themes of socio-cultural, environmental, and economic sustainability, impact of tourism on a destination, visitor engagement with tourism communities, diversity, and inclusion. To reduce market specific bias and any variation in score composition across markets, the score is reported as an index in the segment profiles
TRAVEL TRADE INDEX – GROUP	The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables cover both overall preference and the specific makeup of their next planned trip
TRAVEL TRADE INDEX – NON-GROUP	The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).