CHINA MARKET PROFILES

China is set to remain a global powerhouse shaping global tourism trends, driven by its vast population and growing appetite for international experiences. Chinese travellers are motivated by a deep respect for tradition, a desire to gain expertise, and the pursuit of culturally rich and immersive journeys.

With their travel expectations blending business and leisure, Chinese travellers are drawn to luxurious experiences, romantic getaways, and destinations that allow them to stay connected with home while embracing new environments.

CHINA

DESTINATION
CANADA

China segmentations considers only population of Beijing, Qingdao, Shenyang, Shanghai, Hangzhou, Nanjing, Suzhou, Chengdu, Xi'an, Guangzhou, Shenzhen (9% of total population)

A GUIDE

TO UNDERSTANDING THE PROFILE

THE STRUCTURE

Understand The Market	○ Overall segment sizes in the market ○ Segment comparison by key metrics	01
Explore The Segments	○ Detailed profiles per segment	04
Glossary	○ Additional definitions for key terminology referenced in this profile	104

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

- Interest in unique and memorable experiences, with an overall openness for different trip types and accommodations, as long as they are established.
- Overall preference for exclusive, world-class, or trendy destinations offering culinary and cultural experiences.
- General reliance on social media, apps, and online resources for travel inspiration, planning, and sharing journeys.

This research focuses on **key target cities in China**, where travellers overindex for Purpose-Driven Families and Culture Seekers. Chinese travellers seek vibrant cultural atmospheres that align with their motivations for novelty, fun, and a deep sense of tradition.

While enjoying fine dining and relying on travel trade and guided tours, Chinese tourists appreciate both flexibility and a high level of support throughout their journeys. At their core, they are driven by a desire to enjoy themselves, let loose, and temporarily forget the demands of daily life, all while embracing new & authentic experiences.

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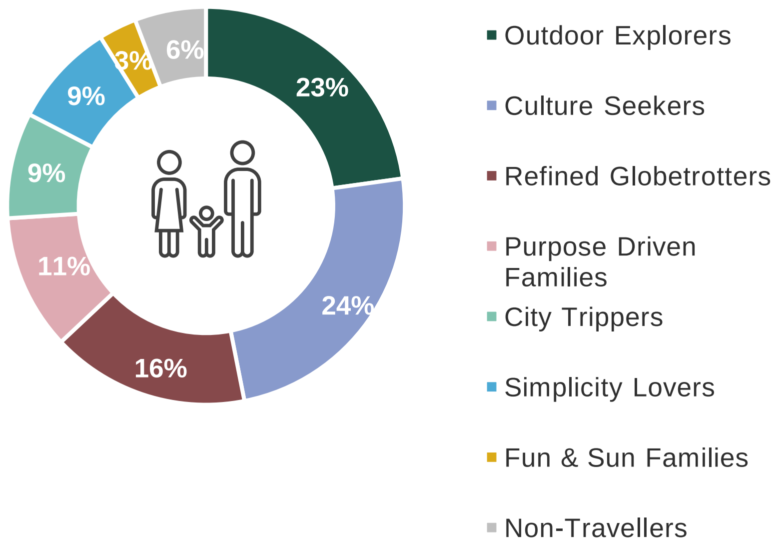
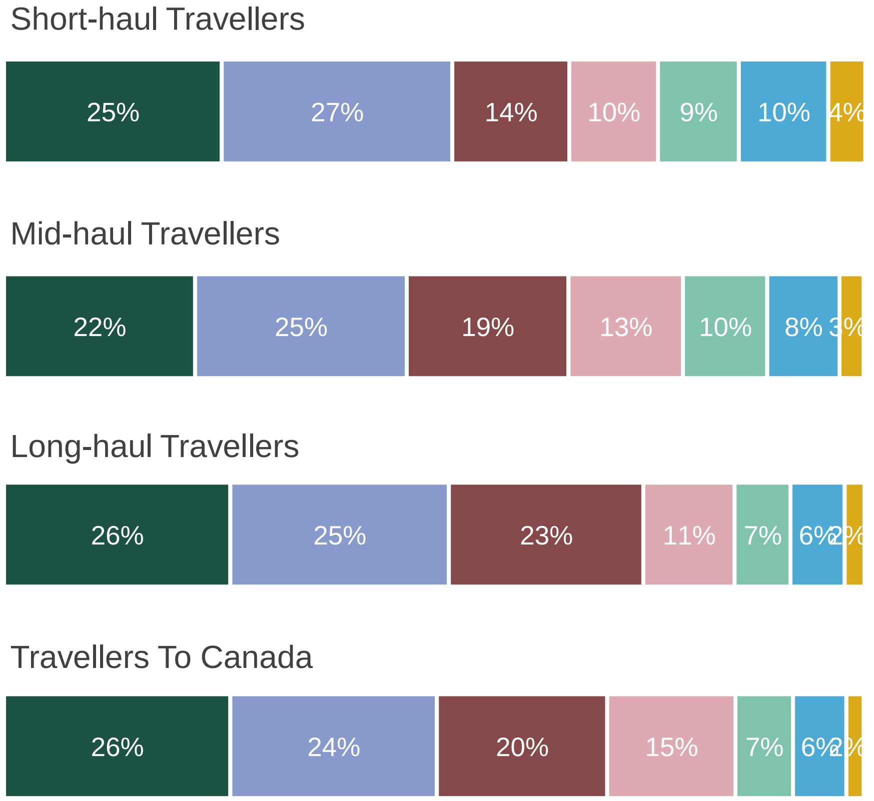
MARKET SIZING

POPULATION BREAKDOWN



5.9% of the adult population in China (est. **105M**) are non-travellers (est. **6M**). Reasons for not travelling include prioritizing responsibilities of caregiving and parenting, and discomfort with travelling due to health risks like Covid.

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

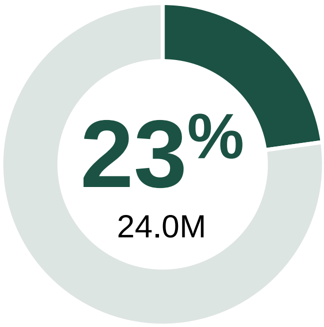
	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	**24.0M**	**Yes**	○ Casual Sports ○ High-Intensity Sports ○ Water Sports	○ Expertise ○ Adventure ○ Importance
CULTURE SEEKERS	**25.2M**	No	○ Festivals & Events ○ Cultural Experiences & Attractions ○ Casual Sports	○ Novel & Authentic ○ Connections ○ Familiarity
REFINED GLOBETROTTERS	**17.2M**	**Yes**	○ Cuisine ○ Cultural Experiences & Attractions ○ Overnight Experiences	○ Novel & Authentic ○ Bonding ○ Security
PURPOSE DRIVEN FAMILIES	**11.3M**	No	○ Cuisine ○ Family-Focused Attractions ○ Cultural Experiences & Attractions	○ Bonding ○ Novel & Authentic ○ Escape & Relax
CITY TRIPPERS	**9.0M**	No	○ Cuisine ○ Shopping ○ Nightlife	○ Fun ○ Bonding ○ Escape & Relax
SIMPLICITY LOVERS	**8.9M**	No	○ Nature Experiences ○ Cuisine ○ Health & Wellness	○ Escape & Relax ○ Familiarity ○ Security
FUN & SUN FAMILIES	**3.3M**	No	○ Family-Focused Attractions ○ Cuisine ○ Nature Experiences	○ 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 CHINA 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 accomplishment through physical activities, and spending on some unique and luxury experiences. We embrace both short getaways and longer holidays, relishing in nature-related experiences.

WHAT YOU NEED TO KNOW ABOUT ME

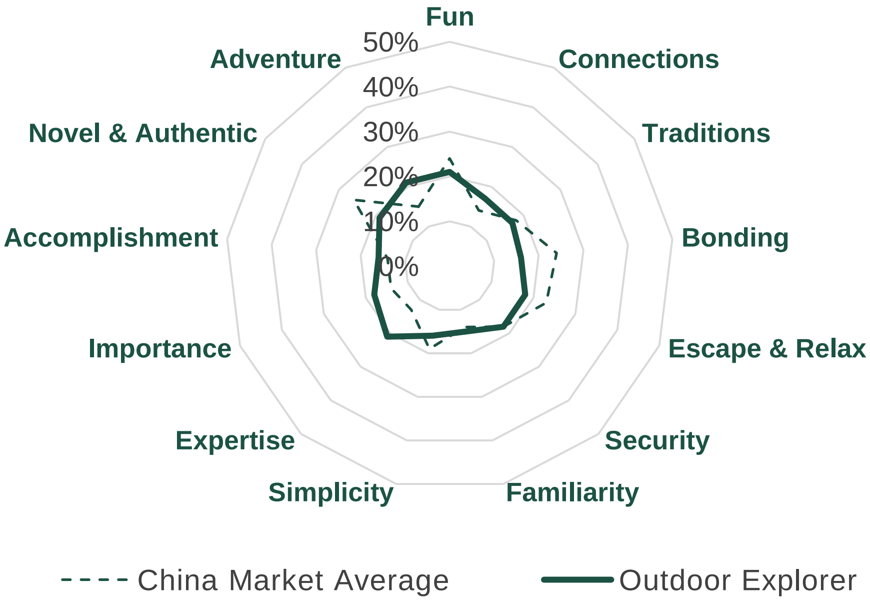
1 We love travel and take all types of trips, and splurge on luxury experiences when we can.

2 We are nature enthusiasts driven by a sense of accomplishment from overcoming challenges in the great outdoors.

3 Living in the moment is an important aspect of travel, to engage socially during our trips and focus on feeling accomplished in our activities.

4 While adventurous, we are not always spontaneous. We like to feel secure in our trip plans and know what to expect.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

83

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

101

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

- We value outdoor experiences and are not afraid of the effort it takes.
- We are motivated by activities challenge us, taking pride in the feeling of accomplishment as a way to communicate our success.
- We prioritize adventurous and unexplored destinations where we can find luxury experiences.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like my holiday to have some form of physical activity	**66%**	124
I go where I want to go, no matter the hurdles	**60%**	122
I learn the basics of a language before visiting a country / region	**59%**	110
I like to keep my travel plans flexible and often book on short notice	**53%**	128
You can get to know a country without experiencing its culture	**51%**	129
I don't consider diversity and inclusion factors when choosing travel destinations	**50%**	137
I'm open to unconventional accommodations when travelling	**50%**	129
I'm more interested in the present and don't focus much on the history of where I visit	**48%**	126
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	**46%**	124
Generally I'm not influenced by what destinations are popular or trendy at the moment	**46%**	132
Local cuisine is not a priority for me; I focus on other aspects of travel	**45%**	132
I am not more likely to select destinations / activities that invest in socially responsible tourism	**41%**	128
I don't consider travel to be an important milestone of growing up	**38%**	124

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel a sense of adventure	**21%**	136
To feel like a travel expert	**21%**	131
To be proud to share my travel experiences	**20%**	133
To feel like I'm important	**18%**	114
To push my limits and challenge myself	**18%**	123
To feel confident travel with no surprises	**16%**	145

DESIRED DESTINATION

	SCORE	INDEX
Adventurous	**28%**	145
Unexplored	**21%**	142
Trendy	**19%**	114
Sociable	**16%**	107
Open	**15%**	99
Luxurious	**15%**	106

OUTDOOR EXPLORERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We represent a diverse age range, and most of us do not have children.
- We are working full-time earning a conservative income.
- Find us primarily in Shanghai, Guangzhou, and Shenzhen.

AGE

	SCORE	INDEX
18-34	**31%**	102
35-54	**33%**	84
55+	**37%**	115
MEAN YEARS	**46.6**	111

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	**21%**	100
>$3K to $6K	**66%**	101
More than $6K	**10%**	106
Refused	**3%**	74

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	**67%**	82
Employed PT	**3%**	129
Self-employed	**11%**	138
Retired	**15%**	100

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	100
Secondary education	**20%**	112
Post-secondary education	**80%**	87

73%
103 Have a valid passport

GENDER

52% 98 Male

48% 102 Female

0% Non-binary / Other

HOUSEHOLD

36% 88 Children <18 Living At Home*

15% 105 Children 18+ Living At Home*

17% 100 Children NOT Living At Home*

47% 118 No Children

** Option is not exclusive*

CHINA CITY BREAKOUT

	SCORE	INDEX
Shanghai	**19%**	70
Shenzhen	**15%**	119
Guangzhou	**11%**	99
Beijing	**10%**	85
Qingdao	**8%**	127
Nanjing	**7%**	110

	SCORE	INDEX
Shenyang	**7%**	103
Xi’an	**7%**	128
Suzhou	**6%**	106
Hangzhou	**5%**	104
Chengdu	**5%**	97

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

78

TRAVEL TRADE INDEX: **GROUP**

108

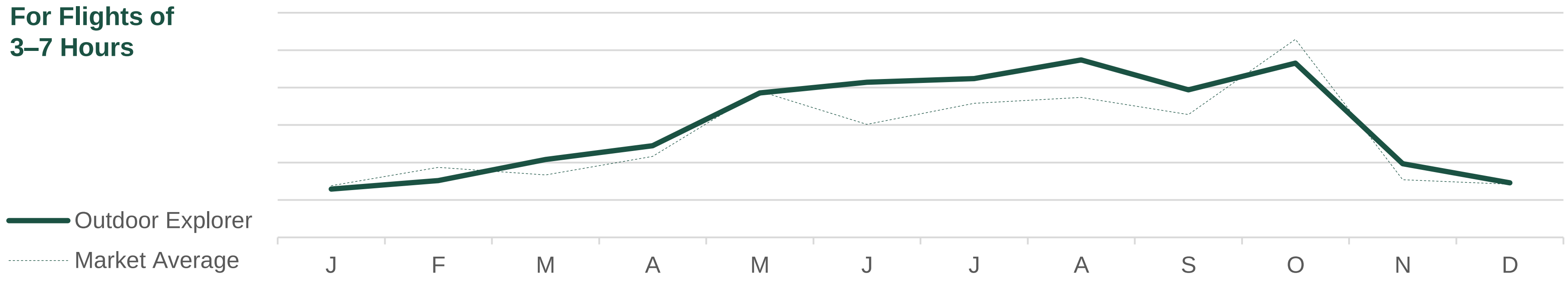
KEY terminology on this page

- **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

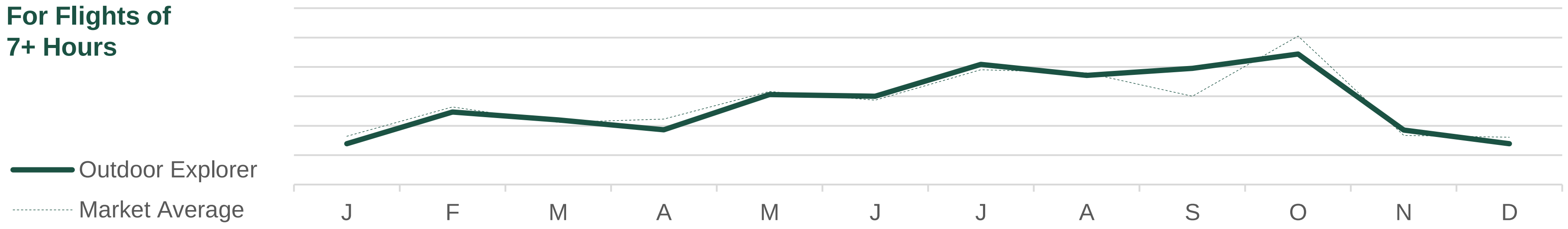
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	41%	79
3-5 Days	31%	79
1 Week Holiday	18%	90
2 Weeks Holiday	12%	114
3 Weeks Or More	13%	124

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	33%	72
International Leisure	18%	101
Business Trip	18%	90
Added Personal To Business	16%	108
Worked During Vacation	18%	100

Incidence is frequency of 2+ times per year

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**29%**	86
Premium Hotel	**27%**	88
Vacation Rental (e.g., Airbnb, Vrbo)	**17%**	93
High-end / Luxury Hotel	**15%**	108
Budget Hotel	**15%**	96
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**12%**	82

THOUGHTS ON INDIGENOUS TRAVEL

52%

96 INDEX SCORE

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

5%

70 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	**58%**	132
I really want to learn about the history of the destinations I visit	**52%**	74
I'm willing to put in the effort while travelling in order to see lesser-known places	**50%**	121
You only ever get to know a country by experiencing its culture	**50%**	71
I'm open to travelling to destinations with limited tourist infrastructure	**49%**	129
I'm open to visiting destinations with challenging climates or weather conditions	**47%**	129

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel with our partner, and often take solo trips.
- Our budgets are healthy, as we prioritize spending on experiences.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**54%**	78
Solo	**26%**	123
Kids	**23%**	91
Friends	**14%**	106
Adult relatives	**10%**	88

BUDGET

AVERAGE SPEND MID-HAUL

$6,550 148 INDEX SCORE

AVERAGE SPEND LONG-HAUL

$7,410 117 INDEX SCORE

SPEND STYLE

Premium to High-end Luxury

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
I consider the impact that I personally have on the destinations I visit	**54%**	86
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**54%**	76
It's important to me that I visit somewhere that is open to diversity and inclusion	**50%**	63
Hearing from underrepresented communities is an important part of travelling	**50%**	93
It's important for me to know that the money I spend will support the local economy I'm visiting	**49%**	92

86%

PRIORITIZE SUSTAINABLE TRAVEL

93 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

- We seek adventure options and anything that lets us immerse ourselves in nature.
- Exploring nature is best when it is something unique, remote, or novel.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Water-based sports	**15%**	129
○ Surfing	**6%**	128
○ Swimming	**5%**	109
○ White-water rafting	**5%**	109
High-intensity sports	**14%**	141
○ Whitewater rafting	**5%**	140
○ Bungee jumping or skydiving	**6%**	140
Winter-based sports	**12%**	120
○ Snowboarding or downhill skiing	**6%**	117
○ Snowshoeing or cross-country skiing	**4%**	126
Nature experiences	**32%**	96
○ Explore wilderness or backcountry	**5%**	126
○ Northern lights	**4%**	98
Casual sports	**21%**	111
○ Ziplining	**5%**	134
○ Road cycling	**6%**	115
Family-focused attractions	**20%**	87
Cultural experiences or attractions	**18%**	60
Overnight experiences	**18%**	88
Local cuisine	**16%**	63
Health and wellness	**17%**	76
Festivals and events	**15%**	83
Guided tours	**12%**	94

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	**43%**	67	**48%**	73
To spend time with family	**38%**	74	**31%**	80
To learn through other cultures	**23%**	79	**26%**	86
To be pampered	**23%**	127	**15%**	108
For a romantic getaway	**22%**	87	**21%**	84
To have fun with friends	**20%**	118	**20%**	122
For adventure and excitement	**22%**	141	**25%**	114
To have memories from top travel spots	**18%**	78	**26%**	91
To seek solitude and isolation	**18%**	131	**15%**	114

EXTERNAL TRIP TRIGGERS

	SCORE	**INDEX**	**SCORE**	**INDEX**
Partner / spouse wanted to go	**41%**	71	**28%**	81
Family / friends wanted to go	**33%**	91	**25%**	107
Kids wanted to go	**20%**	85	**20%**	90
Special event (e.g., wedding, reunion)	**26%**	115	**18%**	92
Festival or event	**21%**	77	**26%**	89
Work dictates destinations	**13%**	66	**9%**	89

39% 103 INDEX SCORE

Travel aligns with children's school schedule

44% 71 INDEX SCORE

Take time off for vacation during major holidays

36% 129 INDEX SCORE

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

OUTDOOR EXPLORERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- While we are often thinking about our next trips, we don't begin planning and booking until a couple months before the trip.

94%

Primary Trip Planner

105
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.

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 – 1.6 months
- Social media

Booked Accommodation – 0.6 month
- Travel booking sites / apps

Booked Activities – 0.6 month
- Travel booking sites / apps

Booked Transportation – 0.5 month
- Travel booking sites / apps

FLIGHT OF 7+ HOURS

Started Researching and Planning – 1.9 months
- Social media

Booked Transportation – 0.8 month
- Travel booking sites / apps

Booked Accommodation – 0.8 month
- Travel booking sites / apps

Booked Activities – 0.8 month
- Travel booking sites / apps

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips are to luxury and outdoor destinations.
- We also take trips like Culture Seekers.

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

5% 87 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Luxury Resort		
COMPANIONS	Couple only	**39%**	
	Alone	**31%**	
TRIP EMOTIONAL MOTIVATIONS	Traditions	Security	Bonding
ACTIVITIES	Golfing	**11%**	
	Explore lakes, rivers, or waterfalls	**10%**	
	Mountain biking	**8%**	
KEY BEHAVIOURS	Splurging for unique and unexplored experiences. Seeking hidden gems for a romantic getaway		

% OF TOTAL TRIPS

6% 94 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Wildlife & Nature Reserve		
COMPANIONS	Alone	**30%**	
	Couple only	**25%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Traditions	Escape & Relax
ACTIVITIES	Outdoor hot tub or bath	**12%**	
	Spas	**12%**	
	Food tours	**11%**	
KEY BEHAVIOURS	Lower budget, planning last minute. Seeking a comfortable climate and stunning landscapes		

% OF TOTAL TRIPS

15% 167 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Eco-Tourism Spot		
COMPANIONS	Couple only	**29%**	
	Alone	**24%**	
TRIP EMOTIONAL MOTIVATIONS	Simplicity	Bonding	Novel & Authentic
ACTIVITIES	Street cuisine	**38%**	
	Local restaurants	**31%**	
	Souvenir shopping	**15%**	
KEY BEHAVIOURS	A trip focussed on quiet relaxation. Simplicity and security in the experience is important		

% OF TOTAL TRIPS

26% 122 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre	**18%**	
	Cultural experience	**15%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Novel & Authentic
ACTIVITIES	Local restaurants	**24%**	
	Visiting famous shopping centres	**14%**	
	Historical or archeological sites	**13%**	
KEY BEHAVIOURS	A trendy destination picked for a festival or event, cultural experiences, and cuisine		

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek access to adventure, wildlife and nature, and if it is remote and less-explored, even better!
- We frequently travel domestically, and take international trips about once a year or more.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
China	**40%**	82	Thailand	**3%**	80
Japan	**5%**	65	Singapore	**2%**	80
France	**3%**	96	New Zealand	**2%**	141
Hong Kong	**3%**	79	Antarctica	**2%**	110
Australia	**3%**	103	Macao	**2%**	97

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	**25%**	111
Provide access to unique natural wonders	**25%**	110
Provides opportunities to view wildlife in its natural habitat	**24%**	137
Provides numerous opportunities for outdoor adventures	**24%**	148
Provides a remote, no-frills experience	**21%**	119
Offers options for adrenaline seekers	**19%**	145
Has packaged holiday / vacation offers	**15%**	116
Offers an eccentric and unique atmosphere	**13%**	111

OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

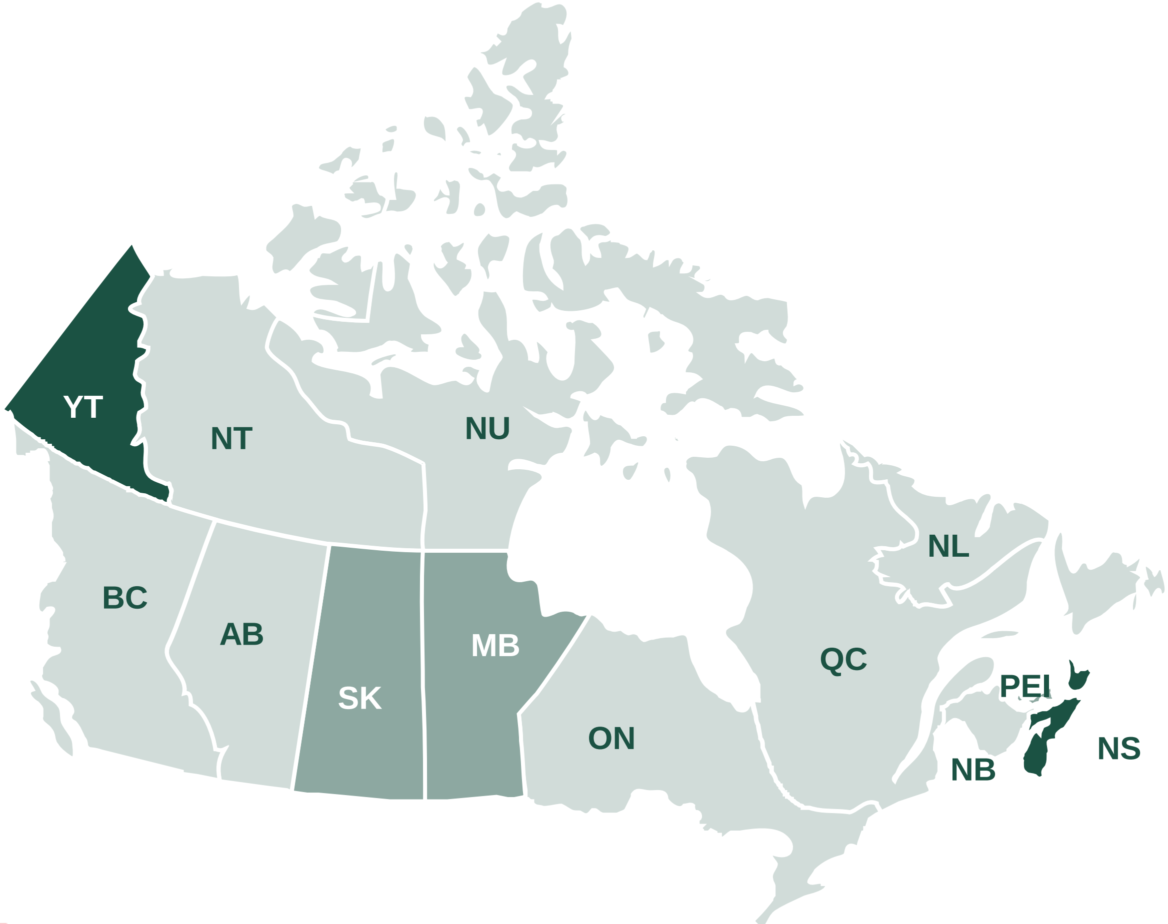
OVERALL INSIGHT

- If we have been to Canada before, it is likely been more than once.
- We overindex on propensity to visit a number of regions, especially Atlantic provinces and the territories.
- For future trips to Canada we are thinking about major cities in Ontario, as well as Vancouver.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	2%	67
BC	6%	71
MB	16%	117
NB	8%	74
NL	20%	102
NS	13%	134
NT	13%	100
NU	12%	114
ON	17%	78
PEI	20%	122
QC	22%	101
SK	7%	123
YT	7%	142

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Our travel to Canada to date has more likely been during Spring and Fall, but we also visit in the Summer.
- If we have not been to Canada before, our knowledge of it as a travel destination is quite low.

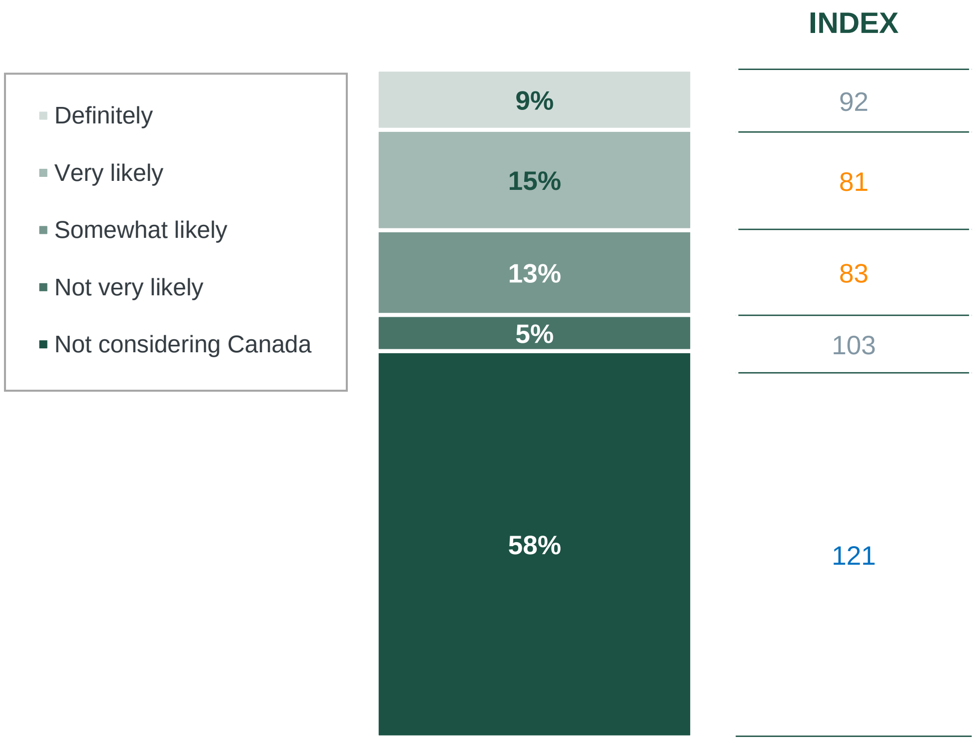
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	**SPRING** (Mar-May)	**SUMMER** (Jun-Aug)	**AUTUMN** (Sept-Nov)
OUTDOOR EXPLORERS	**14%**	**38%**	**44%**	**21%**
VS. TOTAL MARKET	14%	31%	46%	20%

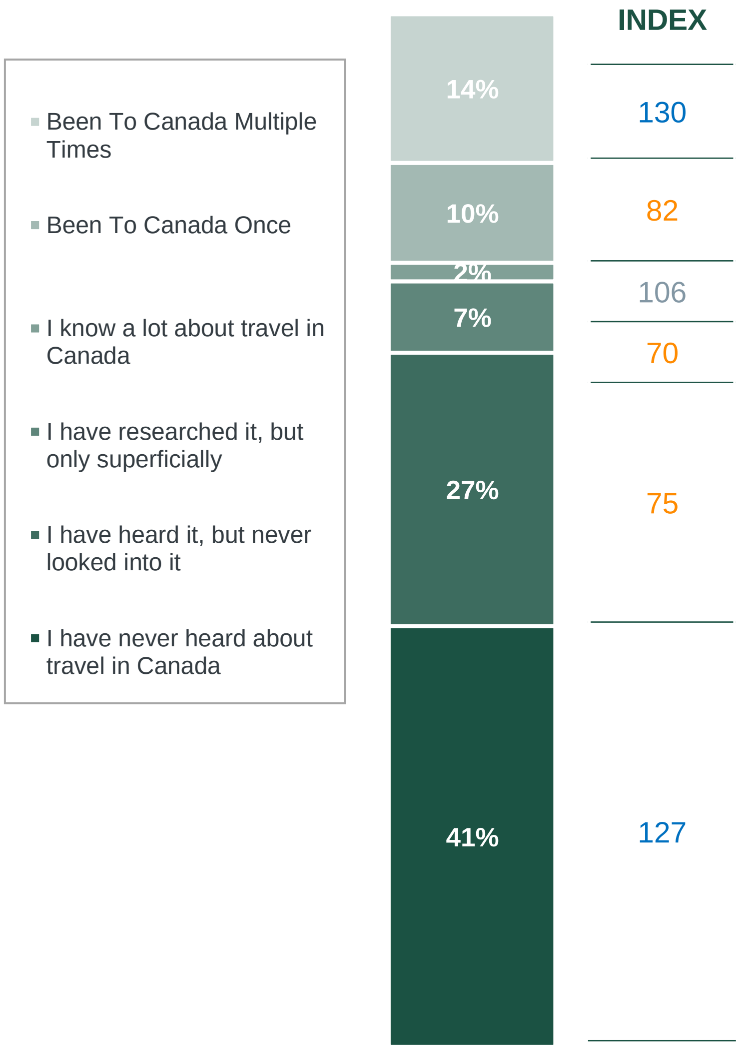
23% **Been to Canada in last 5 years**

111 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Recent life events have included large purchases like a vehicle or perhaps a home.
- Beyond travel, our extra income is spent on experiences and our home.

MAJOR LIFE EVENTS IN LAST 5 YEARS

3%
Had a child
90 INDEX SCORE

13%
Started a new job / career
105 INDEX SCORE

18%
Bought a new home
95 INDEX SCORE

5%
Moved to a new city
108 INDEX SCORE

11%
Child started school
85 INDEX SCORE

32%
Purchased a car
76 INDEX SCORE

4%
Retired
90 INDEX SCORE

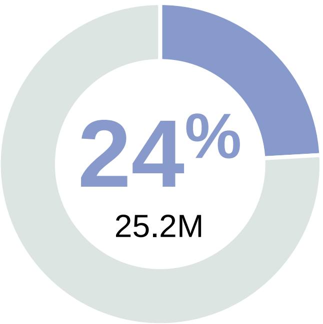
26%
Renovated house
75 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**86%**	130
Experiences (e.g., concerts, events)	**37%**	133
Personal care and wellness	**33%**	66
Fashion and accessories	**31%**	80
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	**30%**	98
Savings and investments	**25%**	79

CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



% OF CHINA 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 are not afraid of trying something different like unconventional accommodations.

3 We try to learn the basics of the language before we travel so we can connect with new people and learn something new.

4 Though we like to stay flexible, we also value the security travel agents and guided tours offer.

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

101

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 new places and like the challenge of exploring something unconventional.
- We like to become familiar with our surroundings by participating in local traditions.
- We select destinations that are open and accepting, which aligns with our carefree and flexible nature.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I learn the basics of a language before visiting a country / region	**60%**	113
I seek out destinations where I can explore my ancestral heritage	**57%**	108
I like natural attractions but I don't usually think they are the highlights of my trip	**55%**	140
I seek travel advice from travel agencies and agents	**51%**	113
I go where I want to go, no matter the hurdles	**51%**	107
I enjoy joining guided tours to explore new destinations	**50%**	111
I like to keep my travel plans flexible and often book on short notice	**50%**	117
I feel best on vacation when being highly active	**47%**	111
I completely disconnect from my work / home life while on holiday	**45%**	111
I'd be open to using AI-powered chatbots for travel planning and assistance	**45%**	103
I'm open to unconventional accommodations when travelling	**43%**	108
I tend to choose a destination to visit based off value for money	**42%**	116
I generally prefer to go back to the same destinations on holiday	**40%**	110

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To be familiar with my surroundings	**23%**	125
To feel connected with new people	**21%**	125
To create new, or take part in old, traditions	**20%**	115
To feel like I've accomplished something	**17%**	127
To feel like a local	**17%**	119
To push my limits and challenge myself	**16%**	114

DESIRED DESTINATION

	SCORE	INDEX
Accepting	**26%**	111
Carefree	**25%**	105
Open	**23%**	137
Caring	**20%**	116
Familiar	**18%**	112
Sociable	**17%**	114

CULTURE SEEKERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We represent a diverse age range and most of us do not have children living at home.
- We are working full-time or are self employed, and earn a medium to high income.

AGE

	SCORE	INDEX
18-34	**33%**	112
35-54	**34%**	87
55+	**33%**	104
MEAN YEARS	**45.0**	97

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	**21%**	99
>$3K to $6K	**67%**	108
More than $6K	**9%**	101
Refused	**3%**	79

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	**70%**	91
Employed PT	**2%**	110
Self-employed	**8%**	109
Retired	**16%**	103

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	90
Secondary education	**19%**	107
Post-secondary education	**81%**	94

80%
118 Have a valid passport

GENDER

52%	101	Male
48%	99	Female
0%		Non-binary / Other

HOUSEHOLD

39%	92	Children <18 Living At Home*
12%	86	Children 18+ Living At Home*
21%	111	Children NOT Living At Home*
40%	106	No Children

** Option is not exclusive*

CHINA CITY BREAKOUT

	SCORE	INDEX
Shanghai	**22%**	89
Beijing	**13%**	122
Shenzhen	**12%**	92
Guangzhou	**12%**	104
Nanjing	**7%**	105
Shenyang	**7%**	101

	SCORE	INDEX
Suzhou	**7%**	115
Qingdao	**7%**	106
Hangzhou	**5%**	98
Chengdu	**5%**	95
Xi’an	**4%**	84

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

109

TRAVEL TRADE INDEX: **GROUP**

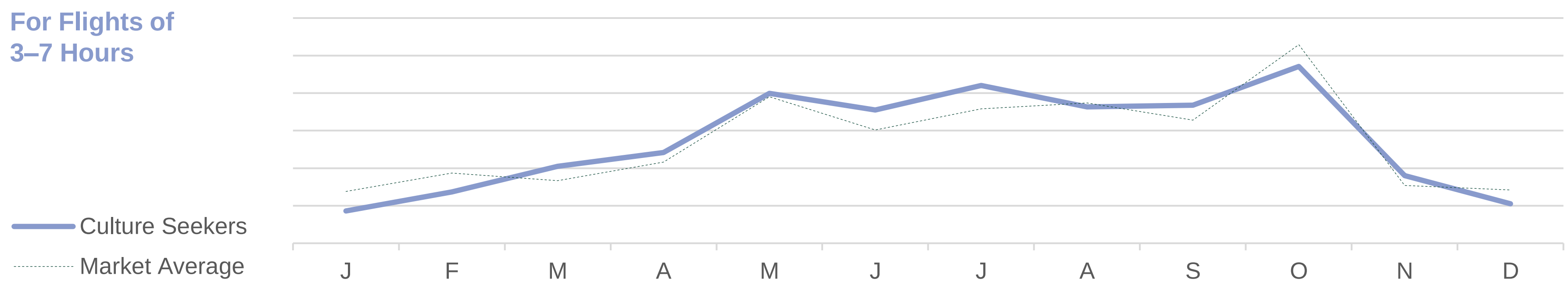
108

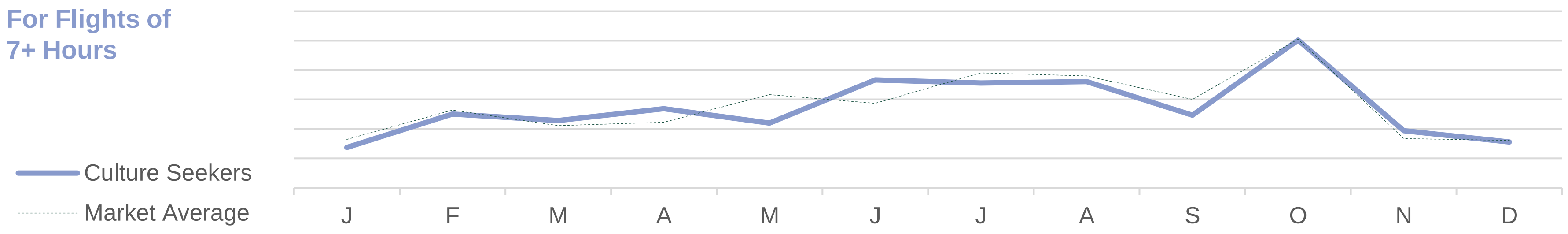
KEY terminology on this page

- **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	46%	89
3-5 Days	35%	92
1 Week Holiday	18%	95
2 Weeks Holiday	11%	108
3 Weeks Or More	11%	112

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	40%	86
International Leisure	18%	99
Business Trip	21%	105
Added Personal To Business	15%	102
Worked During Vacation	18%	101

Incidence is frequency of 2+ times per year

CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**34%**	101
Premium Hotel	**31%**	98
Budget Hotel	**15%**	100
Vacation Rental (e.g., Airbnb, Vrbo)	**15%**	87
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**12%**	87
High-end / Luxury Hotel	**12%**	93

THOUGHTS ON INDIGENOUS TRAVEL

63%

115 INDEX SCORE

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

11%

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	**70%**	109
You only ever get to know a country by experiencing its culture	**57%**	96
I like to explore places that are off the beaten path and less explored	**45%**	110
I'm willing to put in the effort while travelling in order to see lesser-known places	**44%**	103
I'm open to visiting destinations with challenging climates or weather conditions	**41%**	114
I'm open to travelling to destinations with limited tourist infrastructure	**40%**	111

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We are frequent solo travellers, also travel with our partner.
- We sometimes splurge on an experience or unique accommodation.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**53%**	76
Solo	**28%**	130
Kids	**19%**	85
Friends	**13%**	103
Adult relatives	**9%**	84

BUDGET

AVERAGE SPEND MID-HAUL

$4,160 104 INDEX SCORE

AVERAGE SPEND LONG-HAUL

$6,100 95 INDEX SCORE

SPEND STYLE

Premium to High-end Luxury

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	**74%**	123
I consider the impact that I personally have on the destinations I visit	**67%**	119
Hearing from underrepresented communities is an important part of travelling	**62%**	121
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**61%**	102
It's important for me to know that the money I spend will support the local economy I'm visiting	**57%**	115

90%

PRIORITIZE SUSTAINABLE TRAVEL

106 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 explore and immerse in destinations through food and local festivals.
- ○ For some trips we enjoy nightlife or may engage in some causal sports.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**40%**	95
○ Street cuisine	**25%**	90
○ Local restaurants	**23%**	90
○ Cafes or bakeries	**10%**	96
Cultural experiences or attractions	**37%**	97
○ Immersive cultural experiences	**13%**	97
○ Observing architecture	**12%**	93
Festivals and events	**25%**	126
○ Cultural or traditional festivals	**12%**	114
○ Music concerts or festivals	**11%**	116
Nightlife	**12%**	104
○ Bars and pubs	**8%**	104
○ Clubs and dancing	**5%**	105
Casual sports	**22%**	129
○ Casual biking	**11%**	107
○ Road cycling	**7%**	131
Family-focused attractions	**22%**	89
Shopping	**23%**	96
Nature experiences	**20%**	71
Health and wellness	**17%**	80
Overnight experiences	**16%**	77
Winter-based sports	**10%**	105
Guided tours	**10%**	79

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	**60%**	94	**55%**	89
To spend time with family	**47%**	88	**35%**	85
For a romantic getaway	**23%**	97	**24%**	94
To learn through other cultures	**37%**	129	**37%**	115
To have memories from top travel spots	**22%**	112	**37%**	114
To escape from routine	**14%**	87	**10%**	91
To be pampered	**14%**	95	**15%**	110
To check off dream travel places	**18%**	122	**23%**	129
To seek solitude and isolation	**13%**	110	**16%**	116

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	**46%**	81	**27%**	80
Family / friends wanted to go	**34%**	94	**15%**	77
Festival or event	**34%**	121	**34%**	111
Special event (e.g., wedding, reunion)	**24%**	104	**19%**	95
Kids wanted to go	**22%**	86	**14%**	84
Work dictates destinations	**19%**	139	**20%**	115

33% 87 INDEX SCORE

Travel aligns with children's school schedule

52% 92 INDEX SCORE

Take time off for vacation during major holidays

31% 105 INDEX SCORE

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

CULTURE SEEKERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We are generally planning within 2 months of a trip, and book through travel booking sites / apps.

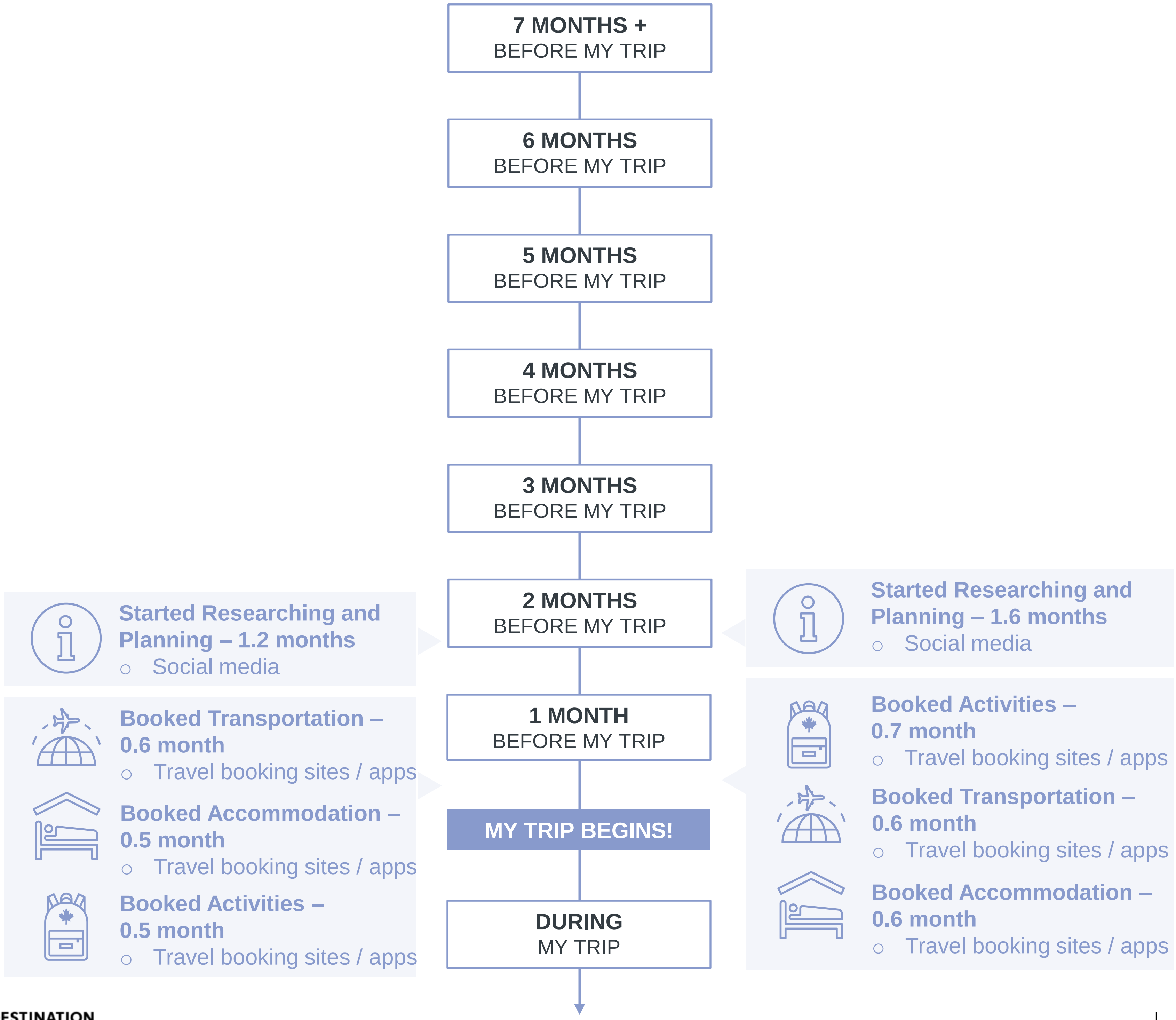
95%

Primary Trip Planner

111
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

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 – 1.2 months
- Social media

Booked Transportation – 0.6 month
- Travel booking sites / apps

Booked Accommodation – 0.5 month
- Travel booking sites / apps

Booked Activities – 0.5 month
- Travel booking sites / apps

Flight of 7+ hours:

Started Researching and Planning – 1.6 months
- Social media

Booked Activities – 0.7 month
- Travel booking sites / apps

Booked Transportation – 0.6 month
- Travel booking sites / apps

Booked Accommodation – 0.6 month
- 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.
- We also take trips like Outdoor Explorers or 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

28% 125 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre	**18%**	
	Cultural experience	**15%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Novel & Authentic
ACTIVITIES	Street cuisine	**23%**	
	Historical or archeological sites	**13%**	
	Visiting nature parks or preserves	**7%**	
KEY BEHAVIOURS	Planning more last minute. All about relaxation, having the best culinary experiences and sightseeing		

% OF TOTAL TRIPS

13% 130 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	**32%**	
	Alone	**32%**	
TRIP EMOTIONAL MOTIVATIONS	Simplicity	Escape & Relax	Familiarity
ACTIVITIES	Local restaurants	**38%**	
	Historical or archeological sites	**25%**	
	Immersive cultural experiences	**20%**	
KEY BEHAVIOURS	Focussed on learning something new and exploring the local culture		

% OF TOTAL TRIPS

6% 97 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Mountain Retreat		
COMPANIONS	Couple only	**37%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Familiarity	Simplicity
ACTIVITIES	See or explore mountains	**17%**	
	Souvenir shopping	**11%**	
	Explore wilderness	**7%**	
KEY BEHAVIOURS	Seeking a peaceful and remote destination with access to nature and mountains		

% OF TOTAL TRIPS

19% 158 INDEX SCORE

SEGMENT ALIGNMENT

● ● ○ ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	**46%**	
	Nuclear family with kids	**23%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Novel & Authentic	Fun
ACTIVITIES	Local restaurants	**71%**	
	Street cuisine	**59%**	
	Visiting famous shopping centres	**47%**	
KEY BEHAVIOURS	Couples trip to explore famous shopping and luxury dining in a new vibrant city		

CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek rich culture and heritage, with attractions, festivals and events to explore.
- We travel domestically, but take regular international trips for both business and leisure.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
China	**45%**	90	Singapore	**3%**	114
Japan	**7%**	99	South Korea	**3%**	117
Hong Kong	**5%**	99	Canada	**3%**	134
Thailand	**4%**	108	France	**3%**	87
Australia	**3%**	117	Antarctica	**3%**	125

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is inclusive and tolerant	**28%**	138
Provides a variety of local festivals and events	**25%**	139
Offers an energetic and dynamic cultural scene	**25%**	120
Has a thriving arts and music scene	**22%**	146
Has a variety of museums and / or historical sites	**21%**	107
Has vibrant nightlife and entertainment	**18%**	127
Provides a bustling and vibrant city vibe	**16%**	108
Offers an eccentric and unique atmosphere	**16%**	128

CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

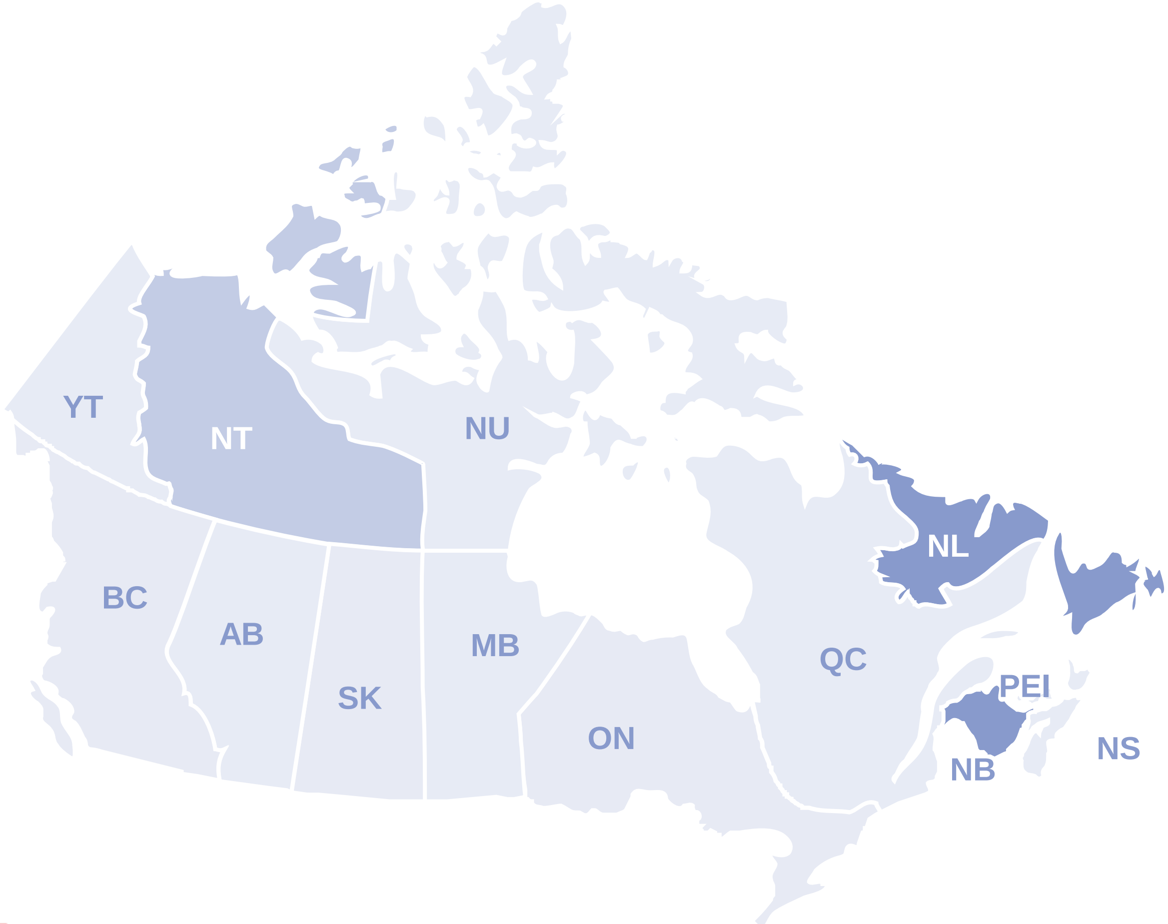
- Many of us have never visited Canada, and if we have, it was only one time.
- We overindex on propensity to visit a number of regions, especially Atlantic provinces and the territories.
- A future visit could include major cities in Ontario or Vancouver.

WHERE DO WE WANT TO GO IN CANADA

VANCOUVER
MANITOBA
QUEBEC
CAPILANO SUSPENSION BRIDGE PARK
STANLEY PARK
CALGARY
ROCKY MOUNTAINS
ATHABASCA FALLS
GREAT SLAVE LAKE
EDMONTON
YUKON
ALBERTA
TORONTO
NEWFOUNDLAND AND LABRADOR
NORTHWEST REGIONS
BANFF
BEACH
CANADIAN SUBURBS
FOREST
VICTORIA
WHISTLER
GARDEN
MONTREAL
ONTARIO
CHINATOWN
OLD QUEBEC
NIAGARA
OTTAWA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	7%	105
BC	22%	114
MB	10%	90
NB	15%	135
NL	23%	128
NS	9%	85
NT	16%	119
NU	10%	107
ON	20%	86
PEI	16%	99
QC	11%	76
SK	5%	100
YT	1%	84

CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Most travel to Canada has been during the spring and summer months.
- Overall, our knowledge of Canada as a travel destination has an opportunity to grow, but we show interest in visiting in the future.

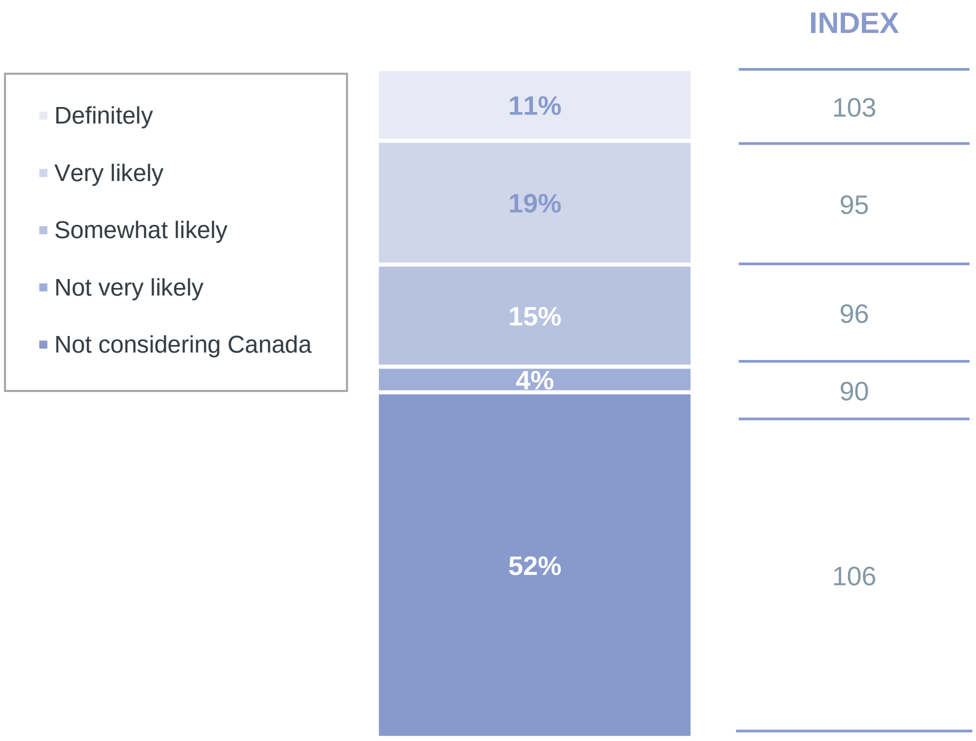
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	**SPRING** (Mar-May)	**SUMMER** (Jun-Aug)	**AUTUMN** (Sept-Nov)
CULTURE SEEKERS	**14%**	**29%**	**49%**	**22%**
VS. TOTAL MARKET	14%	31%	46%	20%

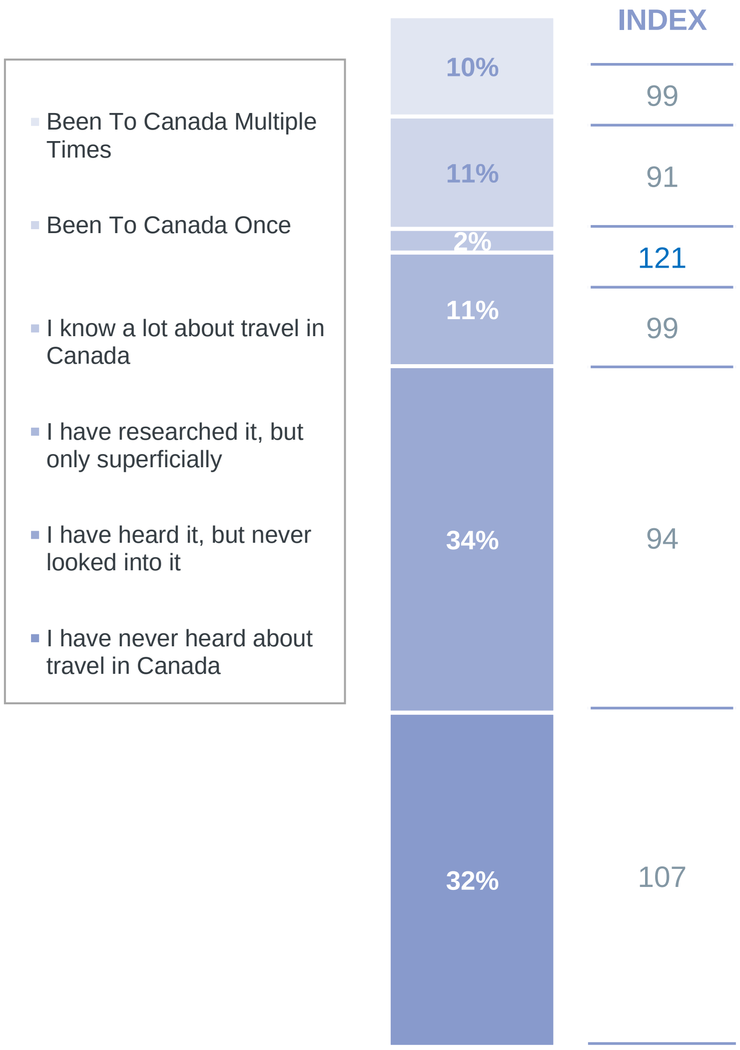
19% Been to Canada in last 5 years

95 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CULTURE SEEKERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- In the last 5 years, we have purchased a new car and invested in home renovations.
- Those of us who are parents may have had a child start school.

MAJOR LIFE EVENTS IN LAST 5 YEARS

5%
Had a child
97 INDEX SCORE

13%
Started a new job / career
107 INDEX SCORE

19%
Bought a new home
96 INDEX SCORE

6%
Moved to a new city
122 INDEX SCORE

16%
Child started school
93 INDEX SCORE

36%
Purchased a car
87 INDEX SCORE

5%
Retired
101 INDEX SCORE

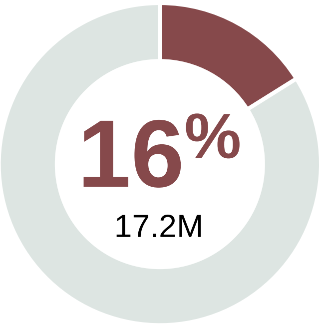
31%
Renovated house
94 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**77%**	103
Personal care and wellness	**38%**	85
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	**35%**	127
Fashion and accessories	**35%**	94
Experiences (e.g., concerts, events)	**32%**	113
Savings and investments	**28%**	86

REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



% OF CHINA 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 off our list.

We immerse ourselves in history, museums, and seek to learn something new from the cultures we experience. Our choice of the best destinations and attractions ensures safe, reliable, and welcoming experiences.

WHAT YOU NEED TO KNOW ABOUT ME

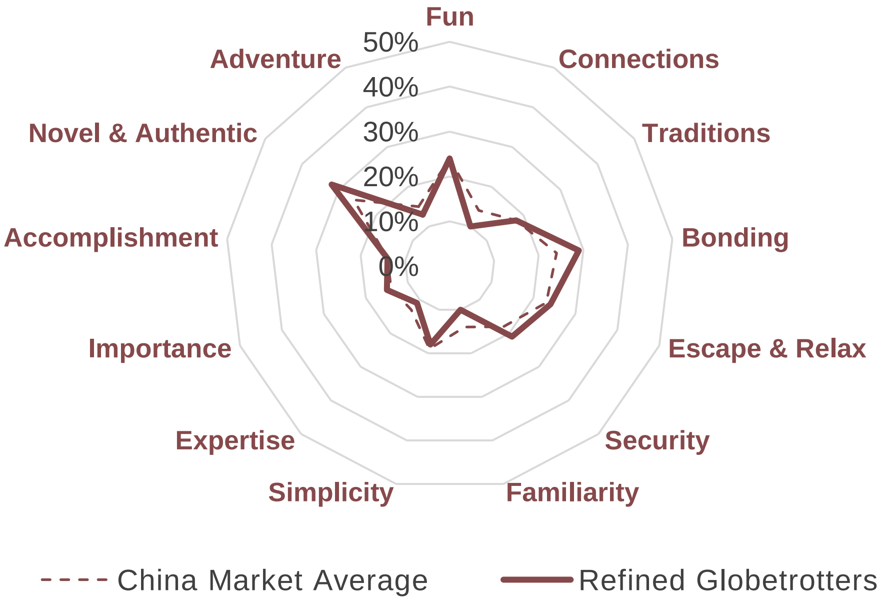
1 Travel is our #1 spending priority.

2 We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.

3 Social media and technology feature in our travel, including inspiration from influencers, apps for planning, and sharing our experiences with friends.

4 Being open to new perspectives and learning about new cultures is important part of our travels.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

120

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

131

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 want to come back from travel with a new perspective.
- Feeling confident that our destinations are safe and reliable are a needed comfort.
- 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%	129
I'm passionate about travelling	78%	119
I like to come back from travels having learnt something new	76%	124
Luxury experiences are an important part of travel	76%	138
When there's a lot of positive buzz about a destination it makes me want to visit it more	73%	137
I love posting my trips on social media to share with friends	72%	122
When traveling, I expect 24 / 7 support from a travel provider	70%	134
I tend to not think about my budget too much when travelling	67%	129
I prefer booking flights and accommodations well in advance	66%	131
I make sure to visit the "famous" sites wherever I go	63%	132
I seek travel advice from travel agencies and agents	60%	138
I seek out fine dining experiences and gourmet cuisine when I travel	59%	134
I enjoy joining guided tours to explore new destinations	53%	123

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	39%	117
To just enjoy myself and have fun	36%	110
To explore and discover new things / places	35%	118
To have authentic experiences	35%	125
To feel safe and secure	28%	121
To open my mind to new perspectives	27%	116

DESIRED DESTINATION

	SCORE	INDEX
Charming	36%	141
Reliable	33%	121
Authentic	30%	133
Luxurious	28%	145
World-Class	26%	142
Exclusive	19%	135

REFINED GLOBETROTTERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are employed full time, and some of us are retired.
- We have medium-high incomes or are comfortable in retirement.
- If we are parents, our kids are entering their teen years, or perhaps not living with us any longer.

AGE

	SCORE	INDEX
18-34	**25%**	80
35-54	**42%**	111
55+	**33%**	103
MEAN YEARS	**46.8**	113

EMPLOYMENT

	SCORE	INDEX
Employed FT	**75%**	108
Employed PT	**1%**	69
Self-employed	**6%**	83
Retired	**17%**	107

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	**10%**	53
>$3K to $6K	**70%**	131
More than $6K	**16%**	147
Refused	**4%**	107

* HH Income reported by month

EDUCATION

	SCORE	INDEX
Primary education or less	**1%**	157
Secondary education	**17%**	99
Post-secondary education	**82%**	97

87%

134 Have a valid passport

GENDER

49%	82	Male
52%	118	Female
0%		Non-binary / Other

HOUSEHOLD

46%	101	Children <18 Living At Home*
15%	107	Children 18+ Living At Home*
22%	116	Children NOT Living At Home*
32%	90	No Children

** Option is not exclusive*

CHINA CITY BREAKOUT

	SCORE	INDEX
Shanghai	**25%**	105
Shenzhen	**15%**	115
Guangzhou	**10%**	94
Beijing	**8%**	65
Shenyang	**7%**	102
Suzhou	**7%**	113

	SCORE	INDEX
Nanjing	**6%**	82
Qingdao	**6%**	101
Chengdu	**6%**	108
Hangzhou	**5%**	105
Xi’an	**5%**	93

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

139

TRAVEL TRADE INDEX: **GROUP**

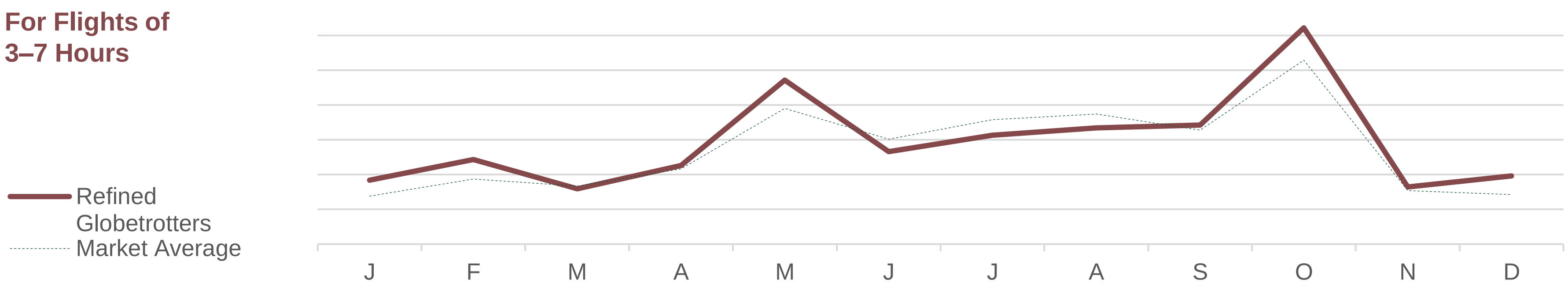
113

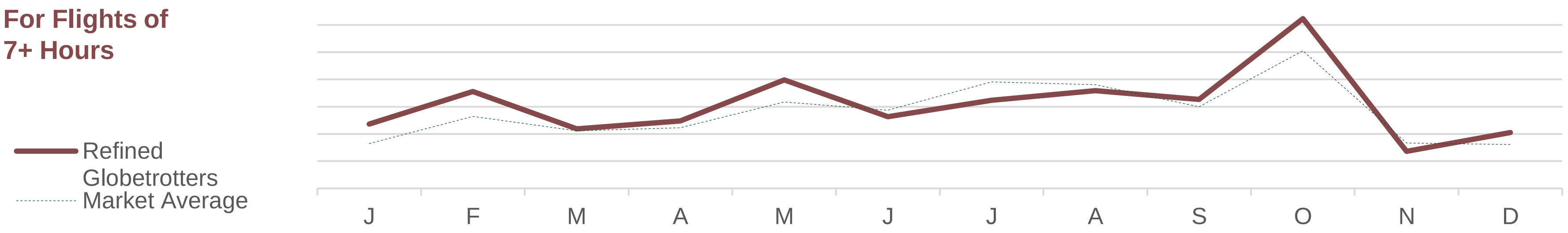
KEY terminology on this page

- **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





TRIP DURATION

		INDEX
1-2 Days	52%	101
3-5 Days	47%	129
1 Week Holiday	28%	137
2 Weeks Holiday	12%	116
3 Weeks Or More	8%	94

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	56%	122
International Leisure	27%	136
Business Trip	22%	108
Added Personal To Business	16%	109
Worked During Vacation	20%	109

Incidence is frequency of 2+ times per year

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Premium Hotel	**45%**	144
Mid-priced Hotel	**27%**	77
High-end / Luxury Hotel	**21%**	143
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**17%**	122
Vacation Rental (e.g., Airbnb, Vrbo)	**14%**	81
Bed & Breakfast	**13%**	108

THOUGHTS ON INDIGENOUS TRAVEL

62%

114 INDEX SCORE

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

18%

129 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	**79%**	127
You only ever get to know a country by experiencing its culture	**69%**	138
I'm willing to put in the effort while travelling in order to see lesser-known places	**38%**	89
I'm open to visiting destinations with challenging climates or weather conditions	**28%**	80
I'm open to travelling to destinations with limited tourist infrastructure	**27%**	82
I like to explore places that are off the beaten path and less explored	**27%**	77

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel primarily with our partner or spouse.
- Our budgets are healthy, as travel is our priority.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**75%**	120
Kids	**28%**	96
Adult relatives	**13%**	103
Solo	**12%**	85
Friends	**10%**	86

BUDGET

AVERAGE SPEND (ALL TRIPS)

$5,340

133
INDEX SCORE

SPEND STYLE

High-end luxury

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	**70%**	114
I consider the impact that I personally have on the destinations I visit	**67%**	118
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**65%**	117
It's important for me to know that the money I spend will support the local economy I'm visiting	**59%**	122
Hearing from underrepresented communities is an important part of travelling	**54%**	104

93%

PRIORITIZE SUSTAINABLE TRAVEL

115 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 and luxury in both cuisine and shopping are a priority.
- We like to explore historical sites and local culture, and enjoy unique overnight experiences.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**60%**	122
○ Street cuisine	**44%**	116
○ Local restaurants	**42%**	121
○ Luxury dining	**28%**	146
Cultural experiences or attractions	**52%**	128
○ Historical or archeological sites	**30%**	128
○ Museums	**24%**	120
Nature experiences	**39%**	112
○ Oceanside beaches	**21%**	116
○ Visiting nature parks or preserves	**19%**	111
Shopping	**35%**	122
○ Visiting famous shopping centres or areas	**25%**	123
○ Luxury shopping	**20%**	149
Overnight experiences	**26%**	148
○ Staying at resort or cabin in nature	**14%**	134
○ Staying at bed & breakfast	**14%**	143
Family-focused attractions	**32%**	101
Health and wellness	**24%**	118
Casual sports	**18%**	68
Guided tours	**17%**	122
Festivals and events	**15%**	81
Nightlife	**9%**	94
Winter-based sports	**9%**	90

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	71%	115	74%	134
To spend time with family	63%	115	60%	116
To learn through other cultures	29%	101	38%	119
For a romantic getaway	31%	139	33%	118
To have memories from top travel spots	23%	120	33%	107
To have fun with friends	14%	88	5%	81
To check off dream travel places	9%	70	10%	83
To learn about your own history or ancestry	7%	87	9%	85
For personal reflection and growth	6%	80	8%	88

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	68%	124	63%	117
Family / friends wanted to go	32%	91	21%	95
Kids wanted to go	37%	102	35%	104
Festival or event	28%	99	33%	108
Special event (e.g., wedding, reunion)	21%	85	20%	99
Visiting friends / family	15%	74	11%	84

37% 98 INDEX SCORE

Travel aligns with children's school schedule

66% 131 INDEX SCORE

Take time off for vacation during major holidays

26% 81 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 just a couple of months ahead, and plan with travel booking sites or social media.

96%

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**	FLIGHT OF **7+ HOURS**

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 – 0.9 month
- Travel booking sites / apps

Booked Transportation – 0.6 month
- Travel booking sites / apps

Booked Accommodation – 0.6 month
- Travel booking sites / apps

Booked Activities – 0.6 month
- Travel booking sites / apps

FLIGHT OF 7+ HOURS

Started Researching and Planning – 1.7 months
- Social media

Booked Accommodation – 1.1 months
- Travel booking sites / apps

Booked Transportation – 1 month
- Travel booking sites / apps

Booked Activities – 1 month
- Travel booking sites / apps

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips explore world renowned destinations and attractions.
- We also take trips like Outdoor Explorers or Culture Seekers

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

14% 128 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	**36%**	
	Nuclear family with kids	**25%**	
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Escape & Relax
ACTIVITIES	Local restaurants	**48%**	
	Historical or archeological sites	**33%**	
	Museums	**27%**	
KEY BEHAVIOURS	Seeking authentic experiences. Visiting a unique destination and spending on experiences		

% OF TOTAL TRIPS

24% 165 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	**46%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Novel & Authentic	Fun
ACTIVITIES	Local restaurants	**71%**	
	Street cuisine	**59%**	
	Luxury dining	**36%**	
KEY BEHAVIOURS	All about luxury culinary and accommodations in a vibrant city		

% OF TOTAL TRIPS

7% 102 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Island Getaway		
COMPANIONS	Nuclear family with kids	**30%**	
	Alone	**28%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Adventure
ACTIVITIES	Street cuisine	**29%**	
	Nature walks	**18%**	
	Oceanside beaches	**15%**	
KEY BEHAVIOURS	Feeling adventure by escaping to a remote destination for fun and relaxation		

% OF TOTAL TRIPS

7% 100 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Historical Site		
COMPANIONS	Couple only	**43%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Novel & Authentic
ACTIVITIES	Historical or archeological sites	**31%**	
	Local restaurants	**22%**	
	Observing architecture	**13%**	
KEY BEHAVIOURS	Selecting friendly and passionate destinations with architecture and history to explore		

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- ○ We enjoy exploring well-known and luxury destinations, with access to nature, through curated experiences.
- ○ Though we travel domestically, we often travel internationally.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
China	**40%**	81	Australia	**4%**	124
Japan	**10%**	143	South Korea	**3%**	119
France	**5%**	129	Singapore	**3%**	103
Hong Kong	**5%**	99	Maldives	**3%**	141
Thailand	**5%**	120	Malaysia	**3%**	143

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**37%**	133
Renowned for food and drink experiences	**35%**	132
Has famous attractions	**31%**	124
Has luxury dining, shopping, and accommodations	**30%**	147
Has a variety of museums and / or historical sites	**28%**	131
Offers all-inclusive resort packages	**20%**	147
Is a trendy destination	**19%**	120
Has packaged holiday / vacation offers	**16%**	127

REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

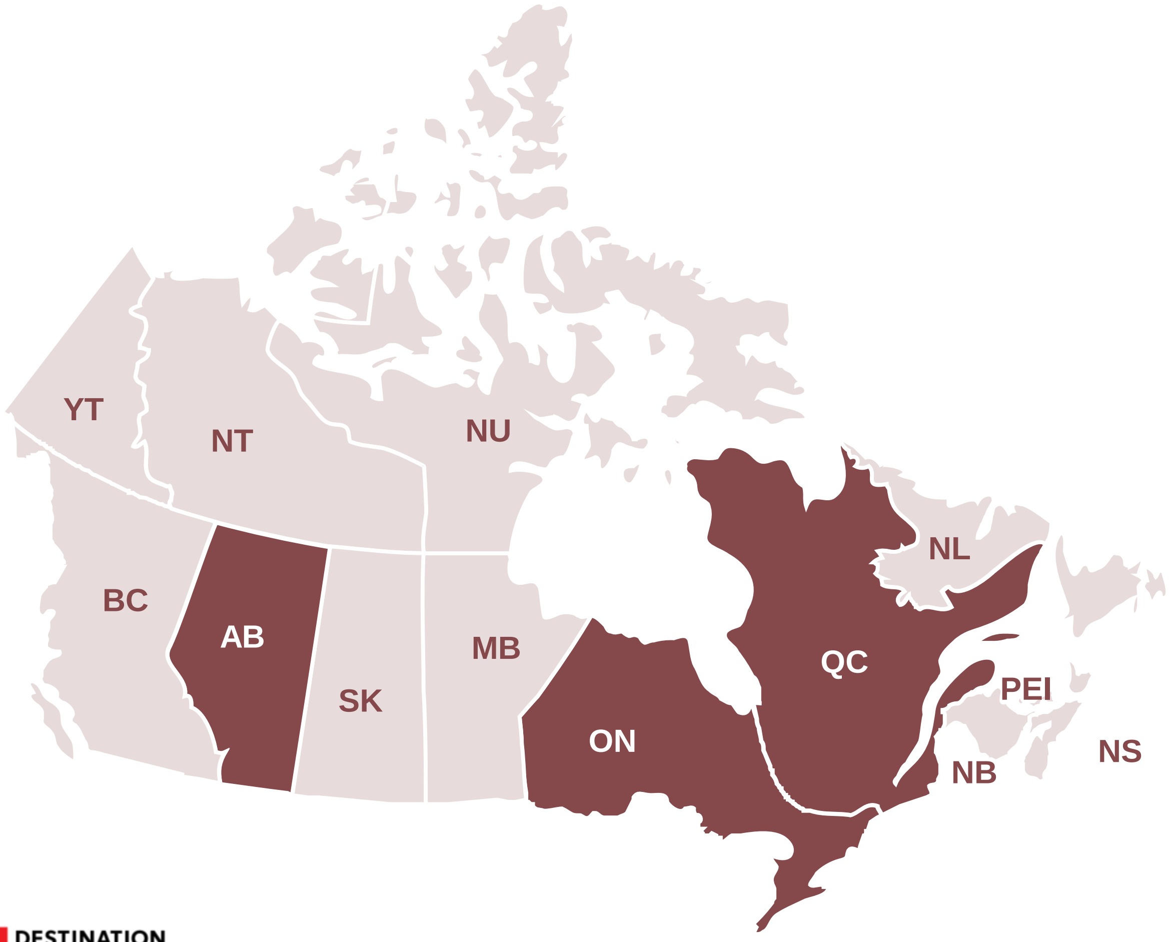
OVERALL INSIGHT

- We have likely visited Canada before, perhaps more than once.
- Overall we have visited a variety of destinations in Canada, with affinity for Ontario, Quebec, and British Columbia.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	10%	129
BC	22%	114
MB	11%	94
NB	10%	92
NL	14%	55
NS	10%	102
NT	11%	78
NU	3%	82
ON	41%	136
PEI	14%	89
QC	36%	133
SK	5%	102
YT	0%	69

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- We are most likely to have visited during the summer months.
- Overall we have some knowledge of Canada, and are likely to consider a trip in the future.

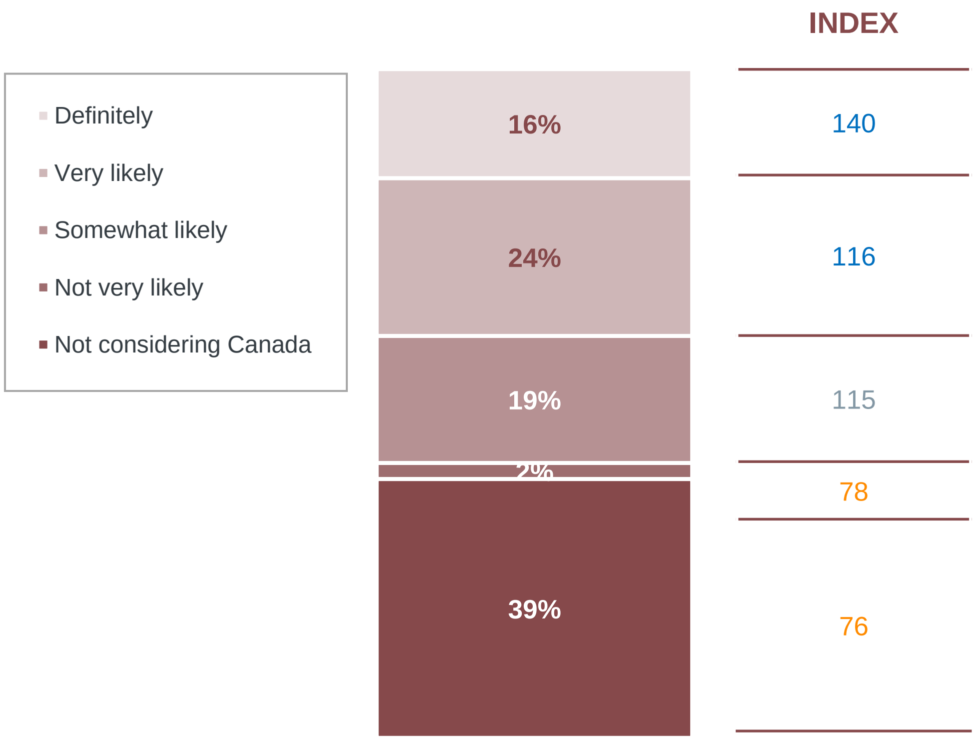
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	**SPRING** (Mar-May)	**SUMMER** (Jun-Aug)	**AUTUMN** (Sept-Nov)
REFINED GLOBETROTTERS	**14%**	**27%**	**54%**	**13%**
VS. TOTAL MARKET	14%	31%	46%	20%

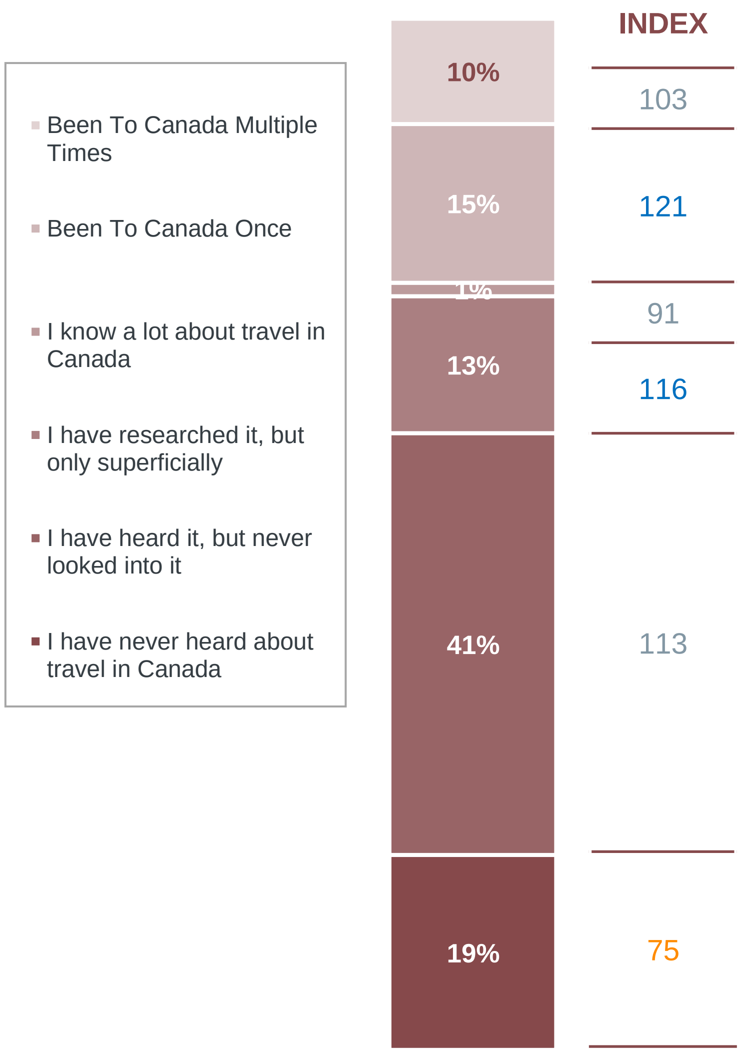
24% Been to Canada in last 5 years

118 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Recent larger expenses include investing in a new car and renovating our homes.
- After spending on travel, our next biggest priority is personal care and wellness expenses.

MAJOR LIFE EVENTS IN LAST 5 YEARS

5%
Had a child
98 INDEX SCORE

9%
Started a new job / career
73 INDEX SCORE

18%
Bought a new home
92 INDEX SCORE

2%
Moved to a new city
61 INDEX SCORE

21%
Child started school
102 INDEX SCORE

53%
Purchased a car
131 INDEX SCORE

6%
Retired
106 INDEX SCORE

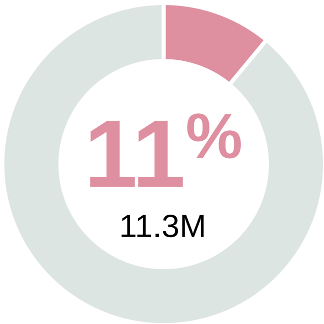
34%
Renovated house
103 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	77%	100
Personal care and wellness	49%	134
Fashion and accessories	39%	109
Savings and investments	34%	101
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	31%	105
Technology and gadgets	26%	106

PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



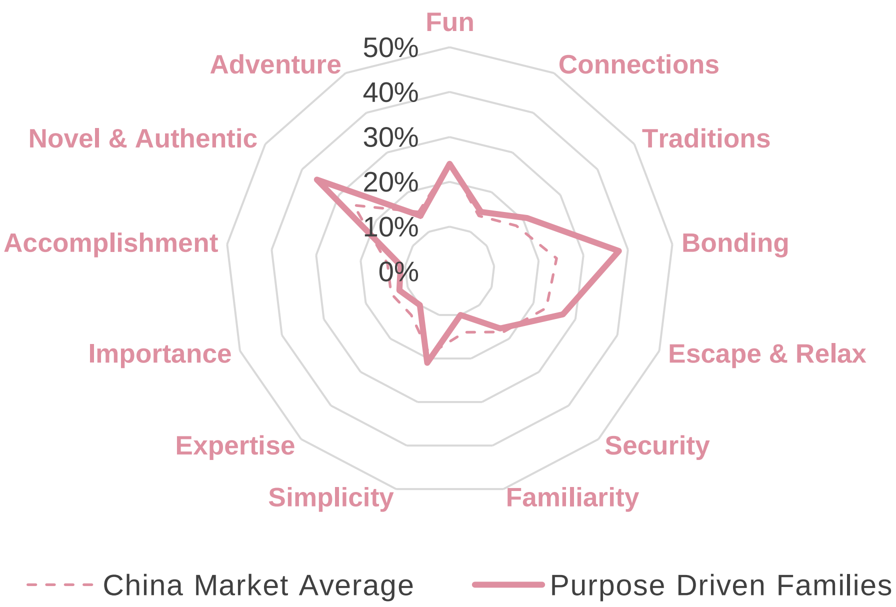
% OF CHINA POPULATION

We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish 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 are not big deterrents; we seek socially responsible, impressive, new experiences.

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize authentic exploration that allows us to discover and learn about the world.
2. Being trendy for us includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.
3. Social media and videos inspire our travel choices, and we love to share our experience online as well.
4. While exploration of new places is important, we also take comfort in selecting destinations which make us feel safe.

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

106

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 from our destinations, reflecting on the culture and environments we engage with.
- Selecting safe and friendly destinations with well-established tourism offerings help us relax and focus quality time with our families.
- We travel to bond and create memories, and value that we can provide these experiences to our children.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	**83%**	130
I like to come back from travels having learnt something new	**79%**	130
I prefer destinations with well-established tourist infrastructure	**78%**	130
I'm always on the look out for new destinations to visit next	**78%**	118
I am more likely to select destinations / activities that invest in socially responsible tourism	**78%**	128
I'm passionate about travelling	**77%**	119
Videos and pictures on social media inspire me to travel	**73%**	120
While I think about value for money, it doesn't tend to influence my choice of destination	**67%**	132
Even while travelling, I like to maintain regular contact with my duties or obligations back home	**67%**	135
I generally think natural attractions are the highlights of my trip	**66%**	134
When I travel to natural environments it makes me reflect on how fortunate I am	**66%**	127
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	**64%**	128
I'd be open to using AI-powered chatbots for travel planning and assistance	**52%**	124

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	**49%**	134
To explore and discover new things / places	**43%**	136
To have authentic experiences	**36%**	129
To open my mind to new perspectives	**30%**	129
To bond through shared experiences	**28%**	146
To create new, or take part in old, traditions	**21%**	132

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	**51%**	123
Safe	**51%**	126
Passionate	**43%**	146
Friendly	**39%**	124
Accepting	**36%**	150
Unique	**30%**	124

PURPOSE DRIVEN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are parents aged 25-44, with kids of all ages.
- We attended post-secondary education, are working full-time, and earn high incomes.

AGE

	SCORE	INDEX
18-34	**31%**	104
35-54	**53%**	144
55+	**16%**	55
MEAN YEARS	**41.2**	62

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	**17%**	85
>$3K to $6K	**69%**	122
More than $6K	**11%**	115
Refused	**3%**	74

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	**89%**	149
Employed PT	**1%**	67
Self-employed	**4%**	63
Retired	**6%**	62

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	90
Secondary education	**9%**	54
Post-secondary education	**91%**	146

73%
103 Have a valid passport

GENDER

53%	106	Male
47%	94	Female
0%		Non-binary / Other

HOUSEHOLD

80%	143	Children <18 Living At Home*
10%	71	Children 18+ Living At Home*
5%	57	Children NOT Living At Home*
15%	59	No Children

** Option is not exclusive*

CHINA CITY BREAKOUT

	SCORE	INDEX
Shanghai	**33%**	143
Beijing	**13%**	118
Guangzhou	**12%**	109
Shenzhen	**10%**	75
Nanjing	**7%**	97
Hangzhou	**7%**	132

	SCORE	INDEX
Chengdu	**5%**	101
Suzhou	**5%**	83
Xi’an	**4%**	76
Qingdao	**3%**	66
Shenyang	**3%**	56

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

93

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).
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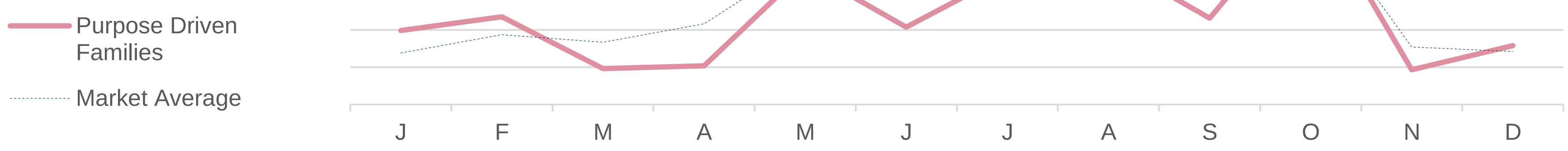
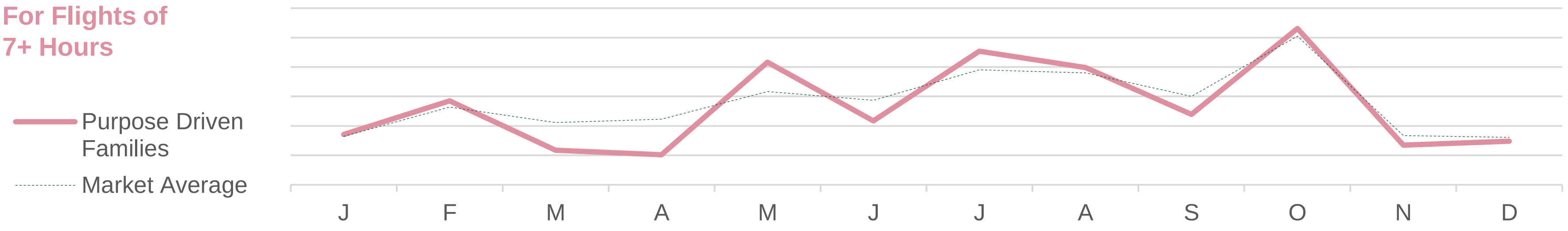
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	63%	125
3-5 Days	46%	127
1 Week Holiday	23%	117
2 Weeks Holiday	8%	89
3 Weeks Or More	7%	88

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	59%	128
International Leisure	18%	100
Business Trip	29%	138
Added Personal To Business	20%	128
Worked During Vacation	26%	132

Incidence is frequency of 2+ times per year

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**37%**	113
Premium Hotel	**28%**	92
Vacation Rental (e.g., Airbnb, Vrbo)	**25%**	125
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**20%**	148
Bed & Breakfast	**16%**	132
Budget Hotel	**14%**	94

THOUGHTS ON INDIGENOUS TRAVEL

64%

117 INDEX SCORE

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

18%

131 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	**80%**	129
You only ever get to know a country by experiencing its culture	**66%**	126
I'm willing to put in the effort while travelling in order to see lesser-known places	**47%**	111
I like to explore places that are off the beaten path and less explored	**35%**	92
I'm open to visiting destinations with challenging climates or weather conditions	**26%**	76
I'm open to travelling to destinations with limited tourist infrastructure	**22%**	70

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	**83%**	136
Kids	**64%**	139
Adult relatives	**10%**	90
Friends	**7%**	74
Solo	**7%**	69

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,130

102
INDEX SCORE

SPEND STYLE

Premium to High-end Luxury

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	**75%**	126
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**73%**	146
I consider the impact that I personally have on the destinations I visit	**65%**	115
Hearing from underrepresented communities is an important part of travelling	**61%**	120
It's important for me to know that the money I spend will support the local economy I'm visiting	**54%**	108

95%

PRIORITIZE SUSTAINABLE TRAVEL

122 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

○ Family attractions, cultural experiences, and local cuisine are highlights.

○ We also explore nature and find opportunities for outdoor wellness experiences.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**61%**	123
○ Street cuisine	**50%**	124
○ Local restaurants	**43%**	123
○ Luxury dining	**17%**	113
Family-focused attractions	**59%**	130
○ Amusement parks or theme parks	**51%**	129
○ Zoos or aquariums	**43%**	130
Cultural experiences or attractions	**55%**	135
○ Historical or archeological sites	**34%**	138
○ Museums	**32%**	140
Nature experiences	**46%**	126
○ Visiting nature parks or preserves	**28%**	133
○ Lakeside beaches	**22%**	132
Health and wellness	**25%**	123
○ Outdoor hot tub or bath	**14%**	125
○ Spas	**12%**	121
Guided tours	**20%**	138
Shopping	**28%**	107
Festivals and events	**23%**	121
Overnight experiences	**22%**	120
Casual sports	**21%**	112
Winter-based sports	**12%**	120
Water-based sports	**12%**	106

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 relax and unwind	**71%**	113	**61%**	102
To spend time with family	**72%**	129	**67%**	124
To learn through other cultures	**32%**	111	**26%**	85
To have memories from top travel spots	**24%**	124	**28%**	96
For a romantic getaway	**19%**	74	**26%**	99
To escape from routine	**16%**	94	**11%**	96
To be pampered	**10%**	80	**11%**	96
To have fun with friends	**9%**	69	**10%**	95
To check off dream travel places	**11%**	81	**11%**	85

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	**71%**	131	**75%**	130
Kids wanted to go	**69%**	135	**65%**	134
Family / friends wanted to go	**35%**	99	**30%**	123
Festival or event	**33%**	115	**29%**	97
Special event (e.g., wedding, reunion)	**23%**	97	**28%**	125
Work dictates destinations	**17%**	107	**11%**	93

54% 138 INDEX SCORE

Travel aligns with children's school schedule

67% 135 INDEX SCORE

Take time off for vacation during major holidays

28% 90 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 do not always plan in advance. Most items are not booked more than a few months before the trip.

96%

Primary Trip Planner

114
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.

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 – 1.1 months
- Social media

Booked Transportation – 0.6 month
- Travel booking sites / apps

Booked Accommodation – 0.6 month
- Travel booking sites / apps

Booked Activities – 0.6 month
- Travel booking sites / apps

FLIGHT OF 7+ HOURS

Started Researching and Planning – 1.7 months
- Social media

Booked Transportation – 0.9 month
- Travel booking sites / apps

Booked Accommodation – 0.8 month
- Travel booking sites / apps

Booked Activities – 0.8 month
- Travel booking sites / apps

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips are to safe destinations where we can share new experiences with our children.
- We also take trips like Refined Globetrotters or Outdoor Explorers.

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% 107 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids	**61%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Simplicity	Novel & Authentic
ACTIVITIES	Street cuisine	**54%**	
	Oceanside beaches	**43%**	
	Zoos or aquariums	**38%**	
KEY BEHAVIOURS	Kid-friendly resort with activities for the kids and sought after landscapes and scenery		

% OF TOTAL TRIPS

19% 149 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Eco-Tourism Spot		
COMPANIONS	Nuclear family with kids	**50%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Street cuisine	**53%**	
	Amusement parks or theme parks	**35%**	
	Visiting nature parks or preserves	**27%**	
KEY BEHAVIOURS	Visiting a destinations known for natural wonders. May stay in a vacation rental		

% OF TOTAL TRIPS

21% 157 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	**46%**	
	Nuclear family with kids	**23%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Novel & Authentic	Fun
ACTIVITIES	Local restaurants	**71%**	
	Street cuisine	**59%**	
	Visiting famous shopping centres	**47%**	
KEY BEHAVIOURS	Couples trip to explore famous shopping and luxury dining in a new vibrant city		

% OF TOTAL TRIPS

6% 99 INDEX SCORE

SEGMENT ALIGNMENT

● ● ○ ○ ○

TRIP TYPE	Island Getaway		
COMPANIONS	Nuclear family with kids	**30%**	
	Alone	**28%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Adventure
ACTIVITIES	Street cuisine	**29%**	
	Nature walks	**18%**	
	Oceanside beaches	**15%**	
KEY BEHAVIOURS	Feeling adventure by escaping to a remote destination for fun and relaxation		

DESTINATION CANADA

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We are looking for scenic and culturally rich kid-friendly destinations.
- Most of our travel explores East Asian and Pacific destinations, sometimes Europe.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
China	**59%**	116
Hong Kong	**9%**	149
Japan	**7%**	103
France	**5%**	127
Thailand	**4%**	110

	SCORE	INDEX
Singapore	**4%**	137
Macao	**4%**	147
Australia	**3%**	93
South Korea	**3%**	102
US	**2%**	106

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	**66%**	144
Has a rich cultural and historical heritage	**37%**	133
Provide access to unique natural wonders	**33%**	140
Known for stunning natural landscapes	**31%**	137
Has a variety of museums and / or historical sites	**28%**	130
Offers an energetic and dynamic cultural scene	**27%**	125
Is inclusive and tolerant	**24%**	121
Has many hidden gems	**19%**	121

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

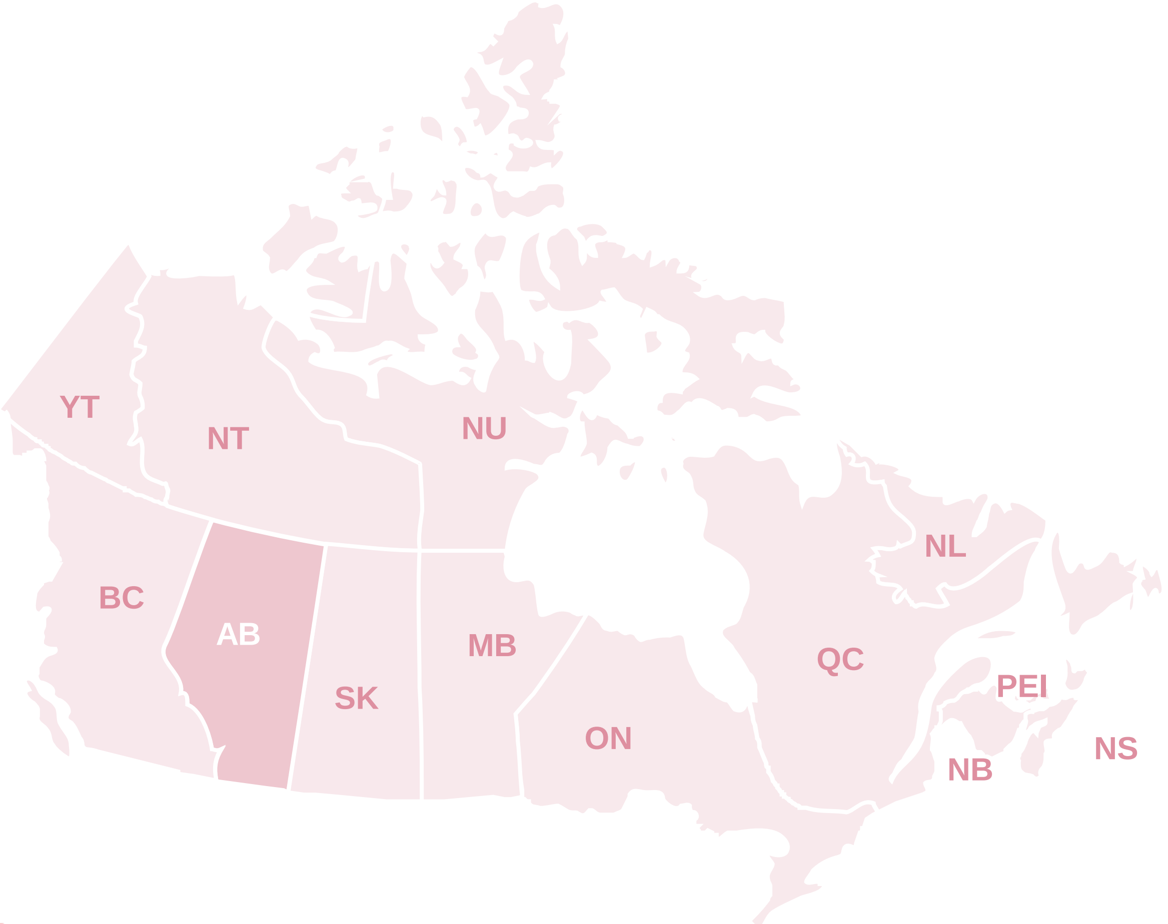
OVERALL INSIGHT

- We may have been to Canada once before, but many years ago.
- Trips to date have explored many provinces.
- A future trip would explore Ontario cities and attractions, or be to Vancouver.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	9%	116
BC	19%	107
MB	15%	114
NB	10%	89
NL	21%	106
NS	6%	60
NT	13%	98
NU	6%	91
ON	31%	112
PEI	13%	88
QC	20%	97
SK	3%	82
YT	3%	103

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- For those of us who have visited Canada, it was most likely during winter or fall months.
- We are familiar with Canada as a travel destination and may consider it for a future trip.

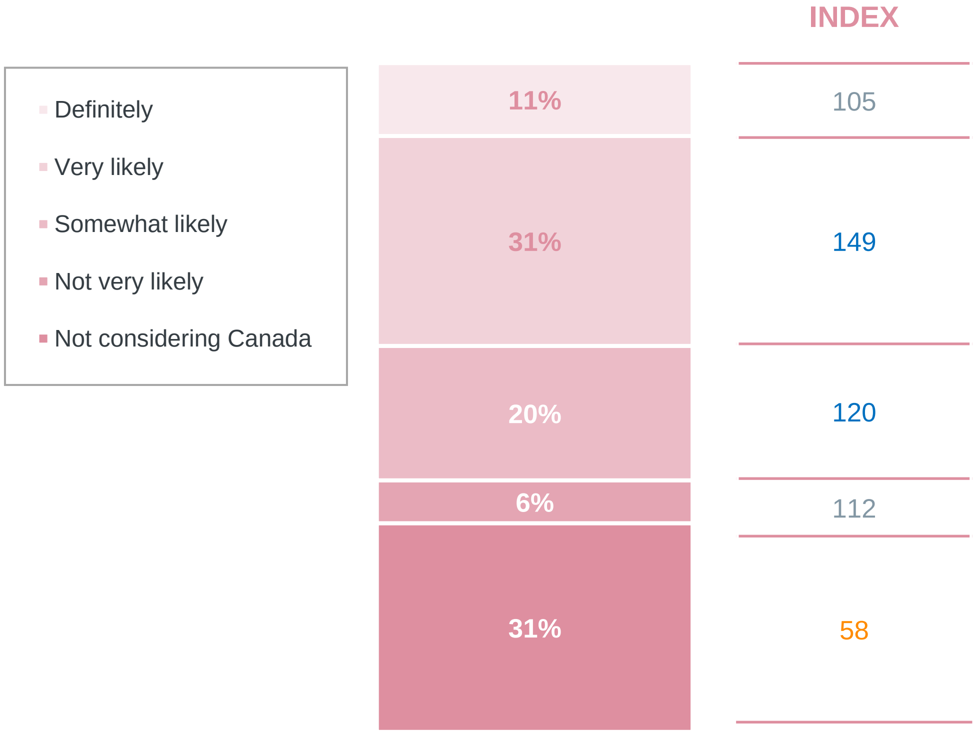
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	**SPRING** (Mar-May)	**SUMMER** (Jun-Aug)	**AUTUMN** (Sept-Nov)
PURPOSE DRIVEN FAMILIES	**17%**	**31%**	**33%**	**22%**
VS. TOTAL MARKET	14%	31%	46%	20%

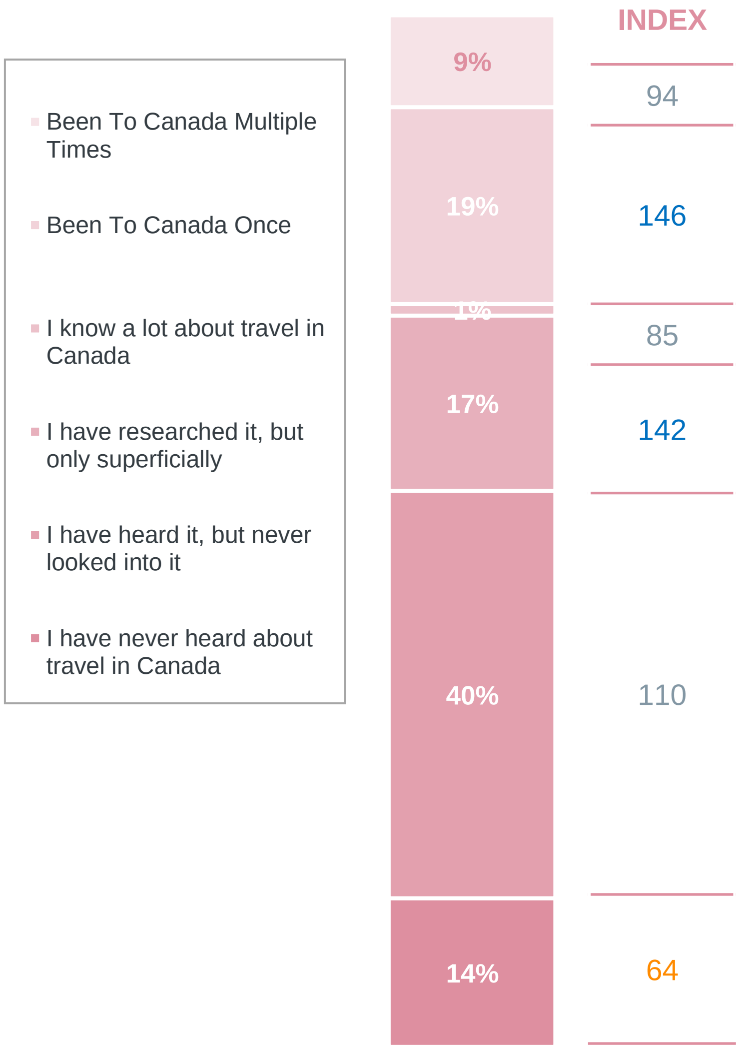
25% Been to Canada in last 5 years

121 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



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 focused 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

11%
Had a child
119 INDEX SCORE

14%
Started a new job / career
111 INDEX SCORE

30%
Bought a new home
148 INDEX SCORE

3%
Moved to a new city
69 INDEX SCORE

43%
Child started school
137 INDEX SCORE

55%
Purchased a car
136 INDEX SCORE

2%
Retired
77 INDEX SCORE

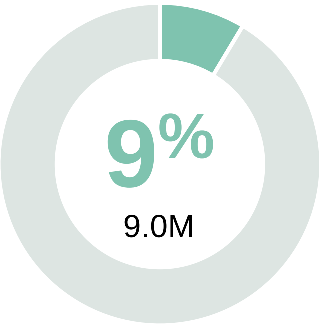
46%
Renovated house
150 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	67%	68
Personal care and wellness	46%	120
Fashion and accessories	43%	127
Savings and investments	41%	120
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	31%	100
Technology and gadgets	26%	102

CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



% OF CHINA POPULATION

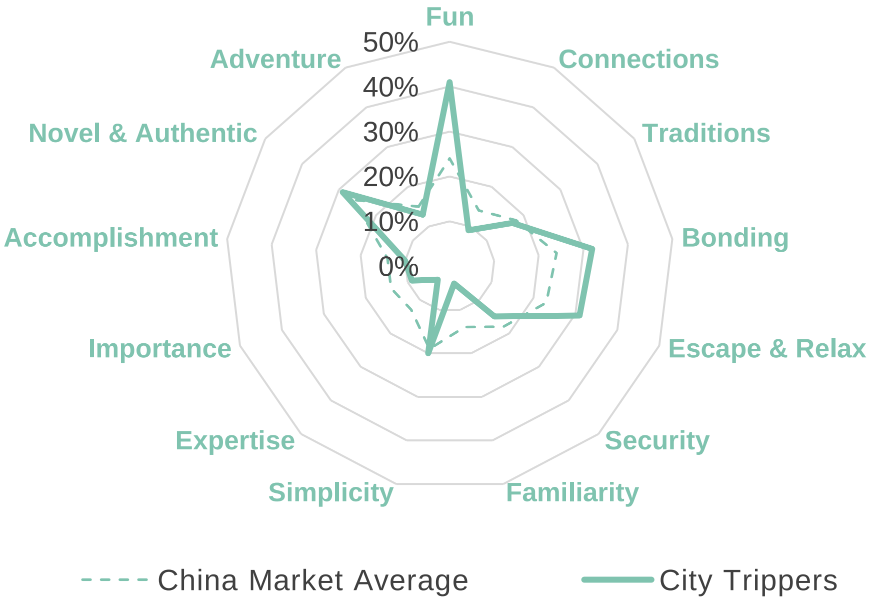
We are independent, sociable, and trendy travelers who prioritize having fun, indulging, and living in the moment. We prefer trendy, friendly locations with a variety of activities and distractions, valuing safety and ease of travel.

We relish culinary and cultural experiences. 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 feel indulgent, even if we are not spending too much.
2. We like to live in the moment and engage with new cultures and destinations through culinary experiences.
3. We value simplicity in our travels, preferring destinations that are convenient to get to and are built for tourism. If we can save some money even better.
4. While we primarily travel as a couple or with friends, we sometimes slow down and travel with parents or extended family.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

88

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

75

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.
- While we seek free-spirited escapes, we are still traditional planners, preferring to book in advance and stick to popular areas.
- Our primary way to engage with the local culture is to immerse ourselves in the local cuisine.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm always on the look out for new destinations to visit next	**86%**	130
Trying out local cuisine is a really important part of travel	**83%**	137
I prefer destinations with lots of distractions and things to do	**82%**	132
I generally stick to the most popular areas when I visit somewhere	**78%**	132
I'm passionate about travelling	**77%**	119
I am more likely to select destinations / activities that invest in socially responsible tourism	**77%**	126
I prefer traditional and well-known accommodation options when travelling	**71%**	138
I prefer relying on traditional travel resources for planning	**70%**	136
I prefer booking flights and accommodations well in advance	**66%**	131
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	**65%**	131
I tend to not think about my budget too much when travelling	**64%**	120
I prefer planning my trips independently and don't consult travel agencies	**63%**	130
I appreciate diversity but not likely engage deeply with Indigenous cultures	**59%**	124

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	**49%**	135
To let loose and forget about day-to-day life	**47%**	137
To indulge myself and live in the moment	**46%**	156
To share quality time with others	**45%**	126
To find much-needed time to relax	**37%**	126
To have a fun, social setting	**27%**	150

DESIRED DESTINATION

	SCORE	INDEX
Fun	**72%**	148
Passionate	**35%**	123
Free-Spirited	**35%**	143
Unique	**32%**	134
Carefree	**32%**	130
Trendy	**25%**	139

CITY TRIPPERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We skew younger, working full-time and earning an average income, though some of us are retired.
- Many of us are not parents, or our children are older and not living at home anymore.

AGE

	SCORE	INDEX
18-34	**38%**	133
35-54	**31%**	80
55+	**31%**	97
MEAN YEARS	**43.9**	86

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	**27%**	128
>$3K to $6K	**63%**	68
More than $6K	**6%**	75
Refused	**5%**	124

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	**72%**	98
Employed PT	**3%**	124
Self-employed	**6%**	81
Retired	**17%**	107

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	90
Secondary education	**20%**	114
Post-secondary education	**80%**	87

68%

92 Have a valid passport

GENDER

53% 103 Male

47% 97 Female

0% Non-binary / Other

HOUSEHOLD

43% 97 Children <18 Living At Home*

16% 114 Children 18+ Living At Home*

18% 100 Children NOT Living At Home*

39% 104 No Children

** Option is not exclusive*

CHINA CITY BREAKOUT

	SCORE	INDEX
Shanghai	**28%**	120
Guangzhou	**13%**	120
Beijing	**10%**	89
Shenyang	**10%**	132
Shenzhen	**8%**	62
Nanjing	**7%**	105

	SCORE	INDEX
Qingdao	**6%**	101
Chengdu	**5%**	100
Xi’an	**5%**	97
Suzhou	**5%**	79
Hangzhou	**3%**	60

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

86

TRAVEL TRADE INDEX: **GROUP**

97

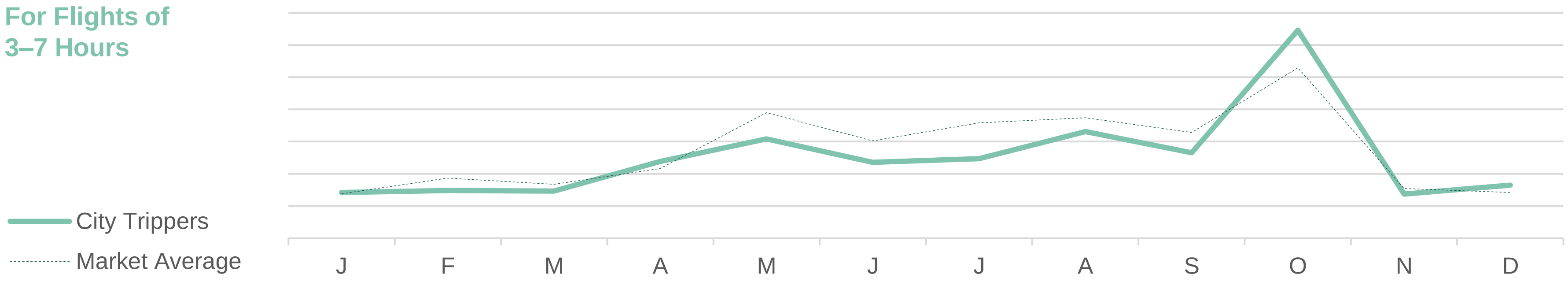
KEY terminology on this page

- **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

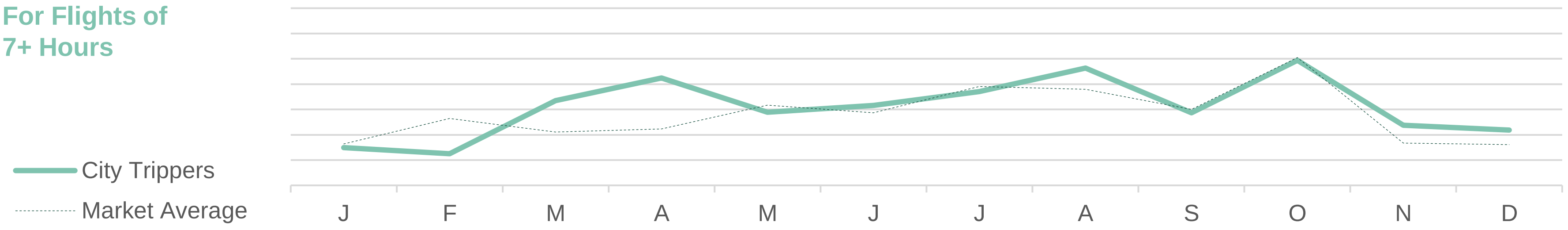
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	71%	142
3-5 Days	45%	125
1 Week Holiday	18%	92
2 Weeks Holiday	4%	61
3 Weeks Or More	5%	74

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	62%	135
International Leisure	12%	74
Business Trip	18%	94
Added Personal To Business	9%	65
Worked During Vacation	15%	91

Incidence is frequency of 2+ times per year

CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**41%**	128
Premium Hotel	**29%**	93
Vacation Rental (e.g., Airbnb, Vrbo)	**28%**	139
Budget Hotel	**20%**	123
Bed & Breakfast	**17%**	142
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**11%**	77

THOUGHTS ON INDIGENOUS TRAVEL

41%

76 INDEX SCORE

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

15%

118 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	**61%**	93
You only ever get to know a country by experiencing its culture	**59%**	105
I'm willing to put in the effort while travelling in order to see lesser-known places	**37%**	86
I'm open to travelling to destinations with limited tourist infrastructure	**24%**	75
I'm open to visiting destinations with challenging climates or weather conditions	**24%**	70
I like to explore places that are off the beaten path and less explored	**22%**	68

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- Our travel groups are generally adults only including our partner, extended family and/or friends.
- Our budget is mid-range. We do not often splurge.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**62%**	93
Friends	**23%**	152
Kids	**21%**	89
Adult relatives	**19%**	127
Solo	**12%**	83

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,120

76
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	**66%**	104
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**60%**	97
I consider the impact that I personally have on the destinations I visit	**52%**	80
Hearing from underrepresented communities is an important part of travelling	**42%**	74
It's important for me to know that the money I spend will support the local economy I'm visiting	**41%**	70

86%

PRIORITIZE SUSTAINABLE TRAVEL

94 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, festivals, and events.
- ○ Our larger travel groups with extended family are well suited to well-known attractions.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**68%**	132
○ Street cuisine	**58%**	136
○ Local restaurants	**51%**	137
○ Luxury dining	**19%**	117
Cultural experiences or attractions	**46%**	116
○ Museums	**27%**	128
○ Historical or archeological sites	**26%**	117
Shopping	**40%**	134
○ Visiting famous shopping centres or areas	**31%**	136
○ Souvenir shopping	**27%**	135
Nightlife	**27%**	157
○ Bars and pubs	**20%**	155
○ Clubs and dancing	**8%**	138
Festivals and events	**24%**	122
○ Music concerts or festivals	**15%**	139
○ Cultural or traditional festivals	**15%**	132
Family-focused attractions	**36%**	105
Nature experiences	**35%**	104
Health and wellness	**23%**	115
Casual sports	**19%**	85
Overnight experiences	**19%**	97
Guided tours	**13%**	101
Water-based sports	**12%**	107

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	**83%**	134	**74%**	134
To spend time with family	**61%**	111	**60%**	116
To have fun with friends	**24%**	134	**15%**	109
To have memories from top travel spots	**18%**	75	**19%**	77
To learn through other cultures	**18%**	64	**23%**	76
To escape from routine	**17%**	96	**5%**	79
For a romantic getaway	**25%**	107	**35%**	124
To be pampered	**13%**	93	**18%**	121
To check off dream travel places	**13%**	91	**9%**	78

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	**53%**	151	**29%**	122
Partner / spouse wanted to go	**64%**	118	**57%**	111
Kids wanted to go	**34%**	99	**26%**	95
Festival or event	**31%**	110	**36%**	117
Special event (e.g., wedding, reunion)	**26%**	115	**27%**	123
Visiting friends / family	**18%**	91	**22%**	115

29% 78 INDEX SCORE

Travel aligns with children's school schedule

57% 107 INDEX SCORE

Take time off for vacation during major holidays

20% 50 INDEX SCORE

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

CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- Many of us plan within a month of our trip, getting recommendations from friends and family.

85%

Primary Trip Planner

62
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

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

Started Researching and Planning – 1.1 months
- Recommendations from friends or family

Booked Activities – 0.6 month
- Travel booking sites/apps

Booked Transportation – 0.5 month
- Travel booking sites/apps

Booked Accommodation – 0.5 month
- Travel booking sites/apps

*The incidence of this traveller segment taking recent trips of the flight duration indicated above resulted in a base size too small for statistically reliable analysis.

CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips focus on fun, escape, and connection with our friends and family.
- 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

18% 104 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Friends Trip		
DESTINATION TYPE	Urban centre		33%
	Eco-tourism spot		26%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants		67%
	Street cuisine		58%
	Nature walks		23%
KEY BEHAVIOURS	All about fun and feeling free with friends. Looking to save some money. May do some sightseeing		

% OF TOTAL TRIPS

33% 180 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only		32%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants		71%
	Street cuisine		60%
	Visiting famous shopping centres		36%
KEY BEHAVIOURS	An escape to a vibrant and trendy destination to really immerse in cuisine		

% OF TOTAL TRIPS

7% 100 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Extended family		38%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		70%
	Oceanside beaches		56%
	Nature walks		34%
KEY BEHAVIOURS	Larger group with extended family. Lower budget, staying in a vacation rental		

% OF TOTAL TRIPS

15% 127 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Eco-Tourism Spot		
COMPANIONS	Couple only		29%
	Extended family		22%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Street cuisine		47%
	Hiking		22%
	Historical or archeological sites		19%
KEY BEHAVIOURS	Quiet destination, with a mild climate. Seeking more intimate accommodation like a B&B		

CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek trendy locations with ease of travel, where famous attractions, culinary experiences, and nightlife are abundant.
- Most of our travel explores East Asian and Pacific destinations.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
China	**69%**	135
Japan	**6%**	87
Hong Kong	**5%**	107
Thailand	**4%**	98
Singapore	**3%**	97

	SCORE	INDEX
France	**2%**	71
Macao	**2%**	94
Canada	**2%**	100
New Zealand	**2%**	90
South Korea	**2%**	81

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a mild and pleasant climate	**43%**	140
Renowned for food and drink experiences	**39%**	142
Has famous attractions	**38%**	143
Is easy to travel to	**33%**	134
Offers a range of scenic viewpoints	**32%**	144
Is a trendy destination	**25%**	146
Isn’t too crowded	**24%**	118
Is easy to travel around once there	**21%**	139

CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

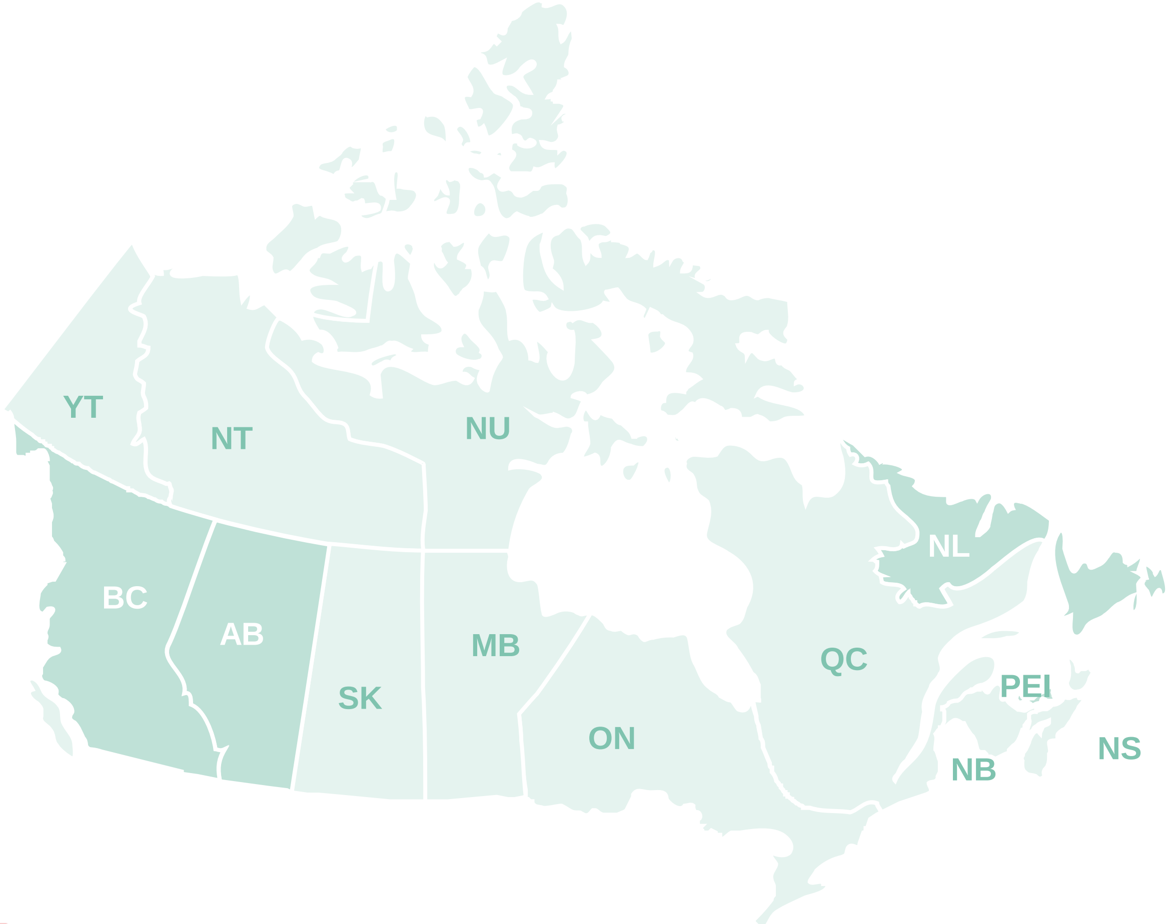
OVERALL INSIGHT

- We are unlikely to have visited Canada before.
- If we have been, it may have been to British Columbia or Alberta.
- A future trip may explore Toronto or Niagara Falls, and Vancouver.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	9%	120
BC	26%	123
MB	9%	83
NB	11%	100
NL	23%	123
NS	11%	114
NT	12%	86
NU	4%	86
ON	25%	97
PEI	14%	90
QC	11%	76
SK	2%	78
YT	2%	91

CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- If we have visited, it has been primarily in the Winter and Summer seasons.
- Overall we do not know much about Canada has a travel destination, and may not plan a visit in the near future.

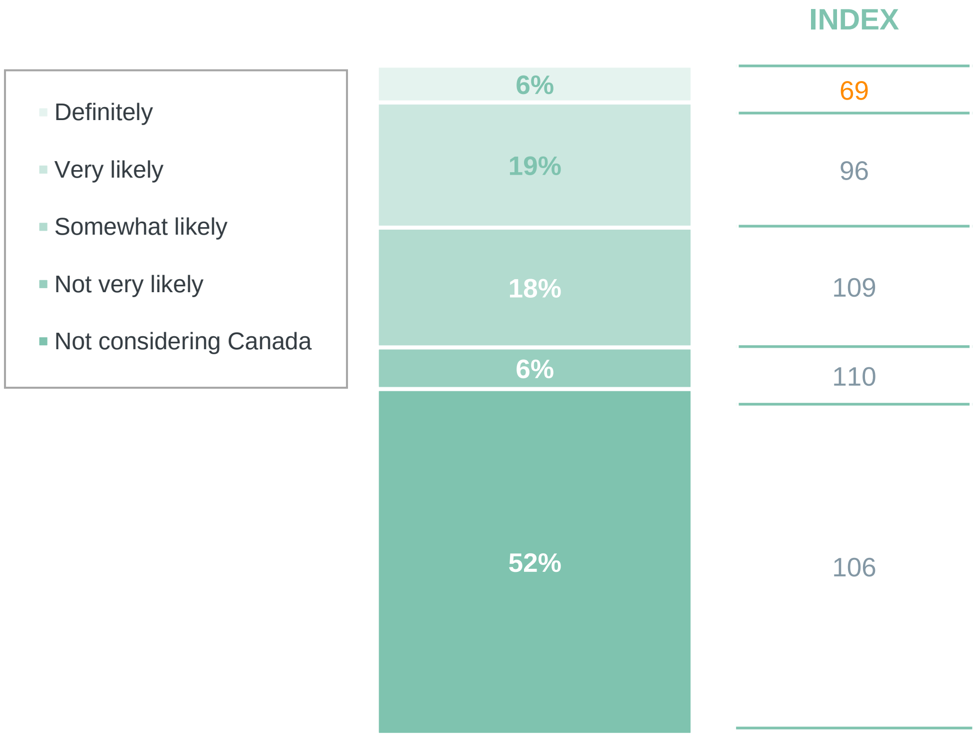
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	**16%**	**29%**	**48%**	**17%**
VS. TOTAL MARKET	14%	31%	46%	20%

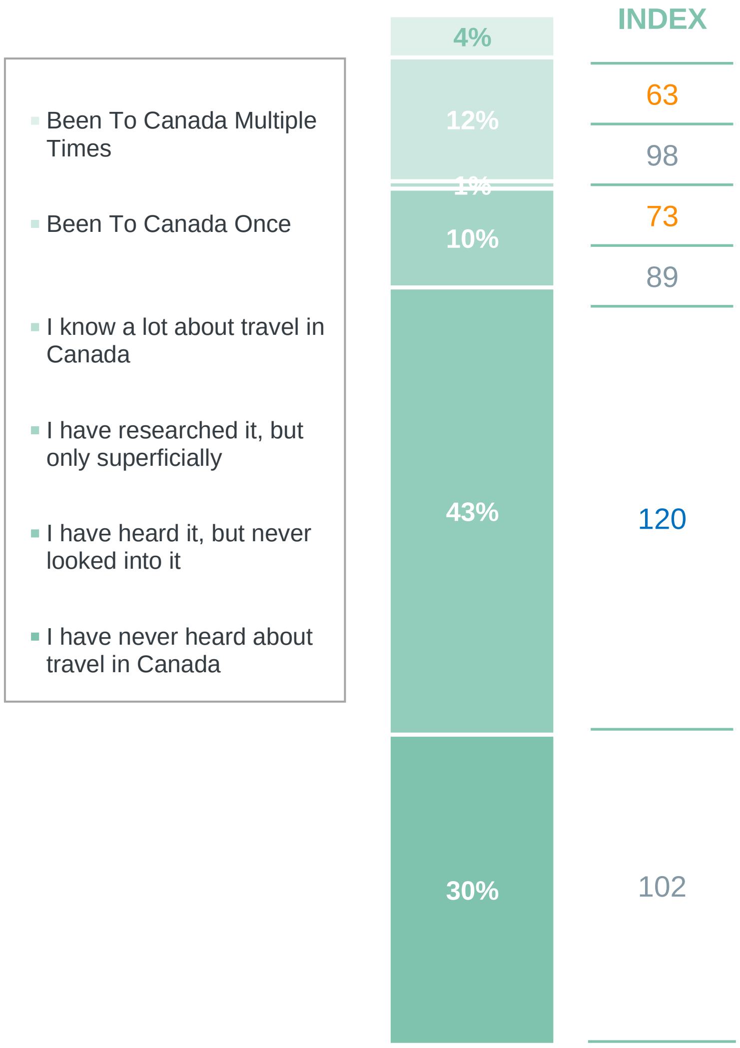
15% Been to Canada in last 5 years

74 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Events in recent years have included travel, purchasing a vehicle, and investing in our home (either moving to a new home or renovating).
- After spending on travel, our next biggest priorities are growing our savings and spending on fashion.

MAJOR LIFE EVENTS IN LAST 5 YEARS

8%
Had a child
107 INDEX SCORE

16%
Started a new job / career
130 INDEX SCORE

22%
Bought a new home
110 INDEX SCORE

6%
Moved to a new city
125 INDEX SCORE

17%
Child started school
94 INDEX SCORE

45%
Purchased a car
110 INDEX SCORE

6%
Retired
102 INDEX SCORE

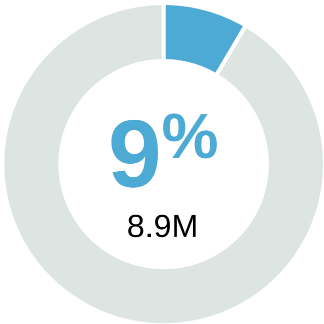
38%
Renovated house
121 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**70%**	78
Fashion and accessories	**46%**	138
Personal care and wellness	**46%**	120
Savings and investments	**41%**	120
Technology and gadgets	**28%**	135
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	**24%**	54

SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



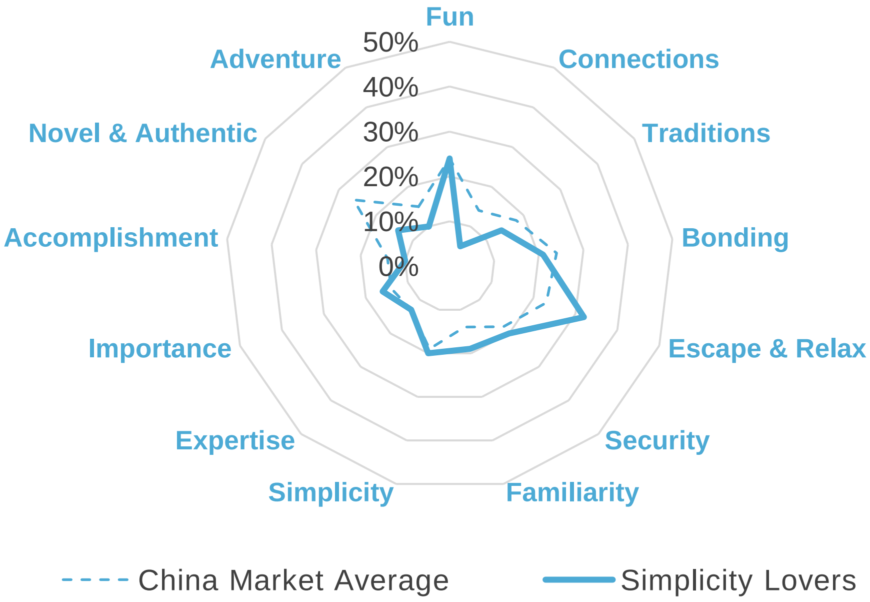
% OF CHINA POPULATION

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 do not 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 do not attract us, we do not want to worry about how to navigate once we arrive. Packaged vacations are attractive.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

63

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

69

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, safe and practical destinations.
- Prioritizing simplicity and serenity, we favor understated locales, and don't see the value of posting our travels online.
- We do not feel the need to travel often, but when we do it needs to be easy, direct, and reliable.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally avoid places that are challenging or difficult to reach	**74%**	134
I appreciate diversity but not likely engage deeply with Indigenous cultures	**70%**	143
I don't generally seek out luxury experiences while travelling	**69%**	125
I generally don't participate in physical activities during my holidays	**68%**	148
I seek out destinations that offer quiet opportunities for deep self-reflection	**64%**	140
I don't see the point of posting about my trips on social media	**61%**	155
I generally prefer to go back to the same destinations on holiday	**59%**	141
I try to keep a strict budget when I go on holiday	**59%**	147
I generally don't think much on the impact that I personally have on the destinations I visit	**56%**	138
It's not important to me that I come back from travels having learnt something new	**55%**	135
I travel when I need to	**54%**	151
I'm more interested in the present and don't focus much on the history of where I visit	**52%**	135
I don't consider travel to be an important milestone of growing up	**41%**	132

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To let loose and forget about day-to-day life	**41%**	123
To find much-needed time to relax	**37%**	125
To escape the demands of everyday life	**23%**	146
To be familiar with my surroundings	**21%**	119
To feel like a local	**17%**	122
To feel welcomed	**15%**	123

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	**54%**	128
Safe	**45%**	116
Reliable	**38%**	134
Peaceful	**34%**	147
Familiar	**28%**	142
Practical	**22%**	147

SIMPLICITY LOVERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are generally aged 45+, likely retired.
- Our monthly incomes are moderate, or can be a little lower due to retirement.
- Our kids are older or have moved out already. We are likely empty nesters.

AGE

	SCORE	INDEX
18-34	**19%**	55
35-54	**42%**	113
55+	**38%**	119
MEAN YEARS	**49.0**	132

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	**26%**	122
>$3K to $6K	**64%**	78
More than $6K	**6%**	77
Refused	**5%**	119

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	**68%**	85
Employed PT	**1%**	86
Self-employed	**5%**	76
Retired	**22%**	132

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	90
Secondary education	**19%**	107
Post-secondary education	**82%**	94

60%

76 Have a valid passport

GENDER

60%	141	Male
40%	59	Female
0%		Non-binary / Other

HOUSEHOLD

33%	84	Children <18 Living At Home*
21%	145	Children 18+ Living At Home*
21%	111	Children NOT Living At Home*
46%	117	No Children

** Option is not exclusive*

CHINA CITY BREAKOUT

	SCORE	INDEX
Shanghai	**30%**	128
Beijing	**14%**	136
Shenzhen	**13%**	98
Shenyang	**9%**	117
Nanjing	**7%**	110
Guangzhou	**6%**	55

	SCORE	INDEX
Xi’an	**5%**	102
Hangzhou	**5%**	98
Suzhou	**5%**	82
Chengdu	**4%**	82
Qingdao	**4%**	68

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

95

TRAVEL TRADE INDEX: **GROUP**

90

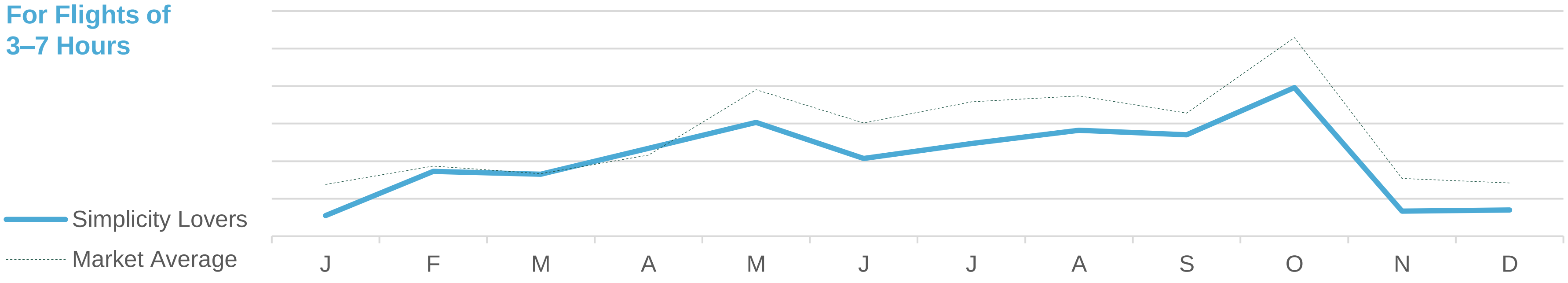
KEY terminology on this page

- **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

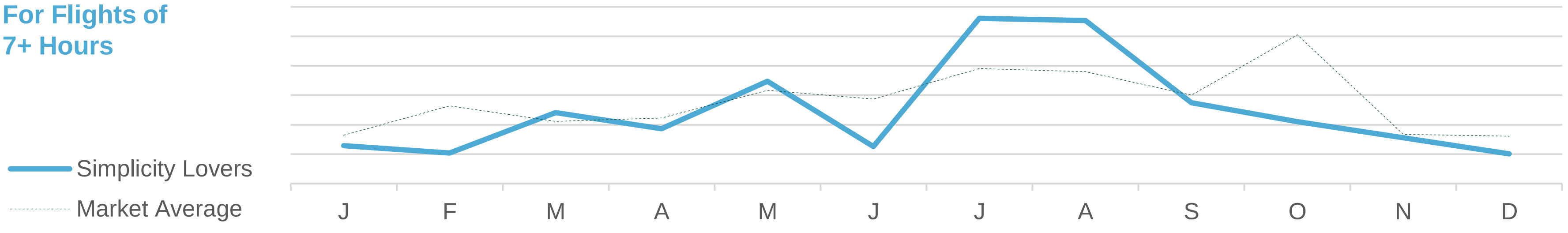
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	50%	97
3-5 Days	27%	69
1 Week Holiday	12%	63
2 Weeks Holiday	7%	78
3 Weeks Or More	5%	77

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	42%	91
International Leisure	12%	73
Business Trip	11%	60
Added Personal To Business	9%	62
Worked During Vacation	7%	60

Incidence is frequency of 2+ times per year

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**37%**	114
Premium Hotel	**25%**	83
Budget Hotel	**21%**	127
Vacation Rental (e.g., Airbnb, Vrbo)	**19%**	102
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**15%**	108
Bed & Breakfast	**13%**	105

THOUGHTS ON INDIGENOUS TRAVEL

30%

57 INDEX SCORE

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

8%

83 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	**50%**	73
I really want to learn about the history of the destinations I visit	**48%**	65
I'm open to travelling to destinations with limited tourist infrastructure	**38%**	106
I'm willing to put in the effort while travelling in order to see lesser-known places	**34%**	79
I'm open to visiting destinations with challenging climates or weather conditions	**34%**	95
I like to explore places that are off the beaten path and less explored	**32%**	86

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**65%**	99
Kids	**26%**	94
Adult relatives	**18%**	124
Solo	**16%**	94
Friends	**12%**	100

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,140

77
INDEX SCORE

SPEND STYLE

Mid-range to Premium

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**54%**	77
It’s important to me that I visit somewhere that is open to diversity and inclusion	**53%**	71
I consider the impact that I personally have on the destinations I visit	**45%**	62
It’s important for me to know that the money I spend will support the local economy I’m visiting	**42%**	73
Hearing from underrepresented communities is an important part of travelling	**38%**	65

78%

PRIORITIZE SUSTAINABLE TRAVEL

68 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 top activities include dining and exploring cultural attractions. We also enjoy spas and saunas.
- We like to get outside for walks and appreciate being in nature.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**44%**	100
○ Street cuisine	**34%**	102
○ Local restaurants	**30%**	102
○ Breweries	**3%**	97
Nature experiences	**40%**	113
○ Oceanside beaches	**20%**	113
○ Nature walks	**19%**	134
Cultural experiences or attractions	**35%**	95
○ Historical or archeological sites	**19%**	98
○ Art galleries	**10%**	115
Health and wellness	**25%**	125
○ Outdoor hot tub or bath	**13%**	119
○ Spas	**12%**	127
Overnight experiences	**17%**	82
○ Staying at bed & breakfast	**8%**	97
○ Train trip	**4%**	102
Family-focused attractions	**30%**	98
Shopping	**21%**	92
Casual sports	**18%**	65
Festivals and events	**12%**	68
Guided tours	**9%**	73
Water-based sports	**7%**	74
Nightlife	**5%**	83

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	**58%**	91	**49%**	75
To spend time with family	**44%**	83	**39%**	90
To escape from routine	**27%**	130	**29%**	151
To have fun with friends	**19%**	114	**33%**	156
For a romantic getaway	**23%**	92	**17%**	72
To learn through other cultures	**22%**	77	**16%**	57
To seek solitude and isolation	**14%**	112	**19%**	129
To check off dream travel places	**15%**	105	**14%**	95
To be pampered	**21%**	122	**20%**	126

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	**48%**	85	**48%**	102
Family / friends wanted to go	**35%**	98	**37%**	148
Kids wanted to go	**30%**	95	**38%**	107
Festival or event	**14%**	53	**11%**	51
Special event (e.g., wedding, reunion)	**16%**	57	**8%**	57
Visiting friends / family	**17%**	84	**11%**	83

35% 92 INDEX SCORE

Travel aligns with children’s school schedule

48% 80 INDEX SCORE

Take time off for vacation during major holidays

32% 109 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 do not need to book many items, as we are often driving distance and do not book activities.

85%

Primary Trip Planner

58
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

*The incidence of this traveller segment taking recent trips of the flight duration indicated above resulted in a base size too small for statistically reliable analysis.

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

*The incidence of this traveller segment taking recent trips of the flight duration indicated above resulted in a base size too small for statistically reliable analysis.

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips visit quiet and relaxing destinations where we can spend quality time.
- We also take trips like Outdoor Explorers or 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 | **SEGMENT ALIGNMENT**

20% 159 INDEX SCORE | ● ● ● ● ●

TRIP TYPE	Eco-Tourism Spot		
COMPANIONS	Couple only	**29%**	
	Extended family	**22%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Street cuisine	**47%**	
	Hiking	**22%**	
	Historical or archeological sites	**19%**	
KEY BEHAVIOURS	Quiet destination, with a mild climate. Seeking more intimate accommodation like a B&B		

% OF TOTAL TRIPS | **SEGMENT ALIGNMENT**

6% 98 INDEX SCORE | ● ● ● ● ●

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only	**34%**	
	Nuclear family with kids	**30%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Security
ACTIVITIES	Local restaurants	**38%**	
	Nature walks	**21%**	
	Fall colours	**17%**	
KEY BEHAVIOURS	Safe and reliable destination to avoid crowds. May splurge a little on accommodations		

% OF TOTAL TRIPS | **SEGMENT ALIGNMENT**

5% 92 INDEX SCORE | ● ● ● ○ ○

TRIP TYPE	Wildlife and Nature Reserve		
COMPANIONS	Alone	**30%**	
	Couple only	**25%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Traditions	Escape & Relax
ACTIVITIES	Outdoor hot tub or bath	**12%**	
	Spas	**12%**	
	Food tours	**11%**	
KEY BEHAVIOURS	Lower budget, planning last minute. Seeking a comfortable climate and stunning landscapes		

% OF TOTAL TRIPS | **SEGMENT ALIGNMENT**

17% 147 INDEX SCORE | ● ● ○ ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	**32%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants	**71%**	
	Street cuisine	**60%**	
	Visiting famous shopping centres	**36%**	
KEY BEHAVIOURS	An escape to a vibrant and trendy destination to really immerse in cuisine		

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, with international trips every few years at most.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
China	**63%**	124
Japan	**6%**	80
Thailand	**3%**	84
South Korea	**3%**	107
Hong Kong	**3%**	72

	SCORE	INDEX
Australia	**2%**	83
France	**2%**	73
Singapore	**2%**	63
Malaysia	**2%**	112
New Zealand	**2%**	69

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Isn't too crowded	**36%**	149
Is not too expensive	**34%**	141
Is easy to travel to	**33%**	134
Doesn't take too long to get there	**29%**	155
Language is not a barrier	**21%**	154
Is easy to travel around once there	**20%**	135
Has packaged holiday / vacation offers	**16%**	129
Has a small town feel	**15%**	134

SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

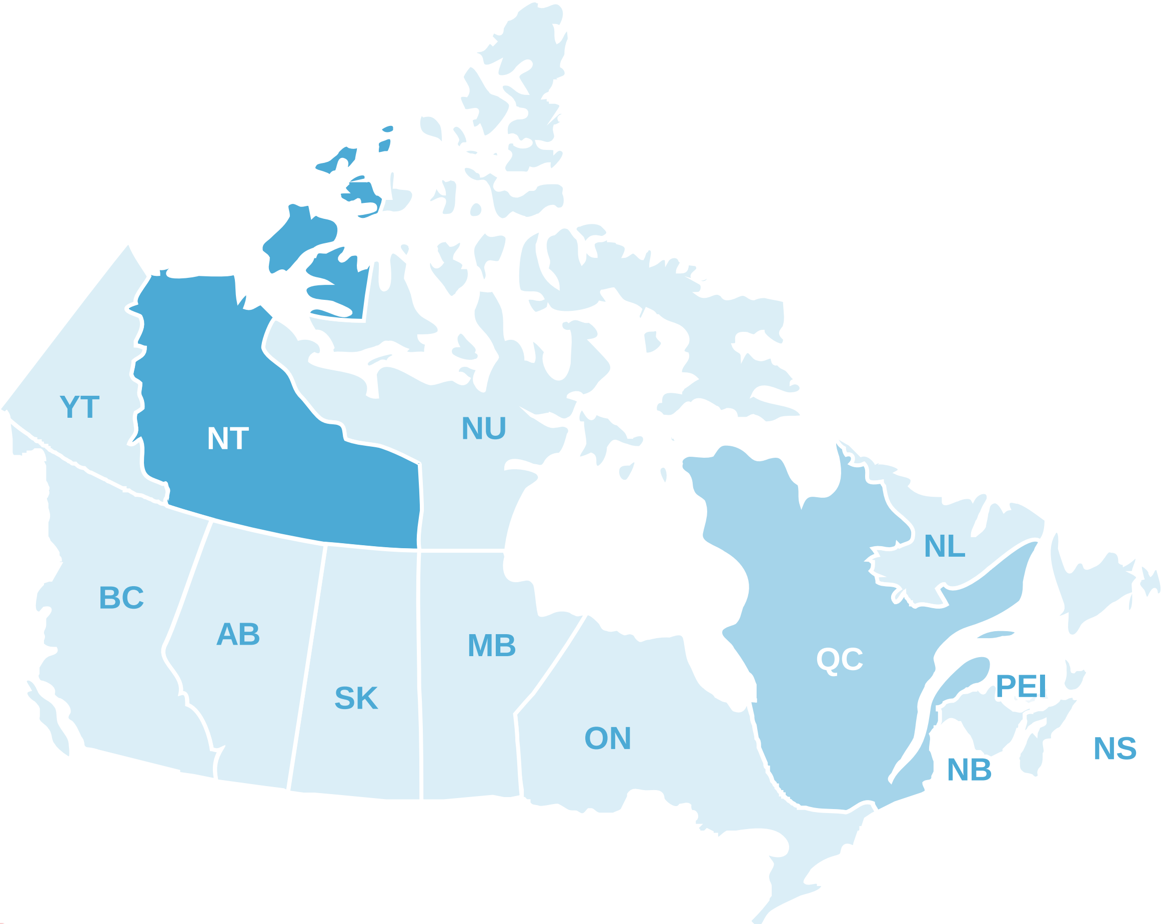
OVERALL INSIGHT

- We likely have not been to Canada before, and do not know too much about it as a travel destination.
- Trips to date have taken us to Quebec and British Columbia.
- We are not likely to consider Canada in the next two years.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	2%	67
BC	17%	101
MB	10%	88
NB	12%	110
NL	19%	95
NS	9%	95
NT	17%	131
NU	7%	95
ON	22%	90
PEI	10%	72
QC	32%	124
SK	0%	57
YT	2%	95

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- If we have visited, it may have been in the fall season to avoid crowds and take advantage of affordable options.
- We also gravitate to the summer season to take advantage of the pleasant weather.

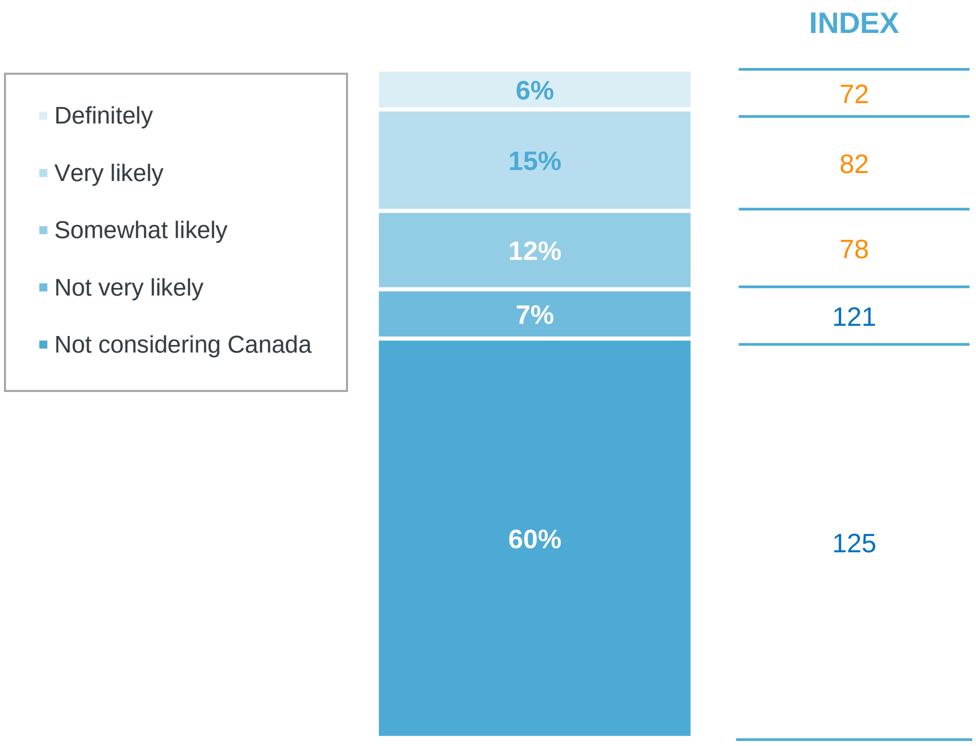
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	**9%**	**34%**	**40%**	**22%**
VS. TOTAL MARKET	14%	31%	46%	20%

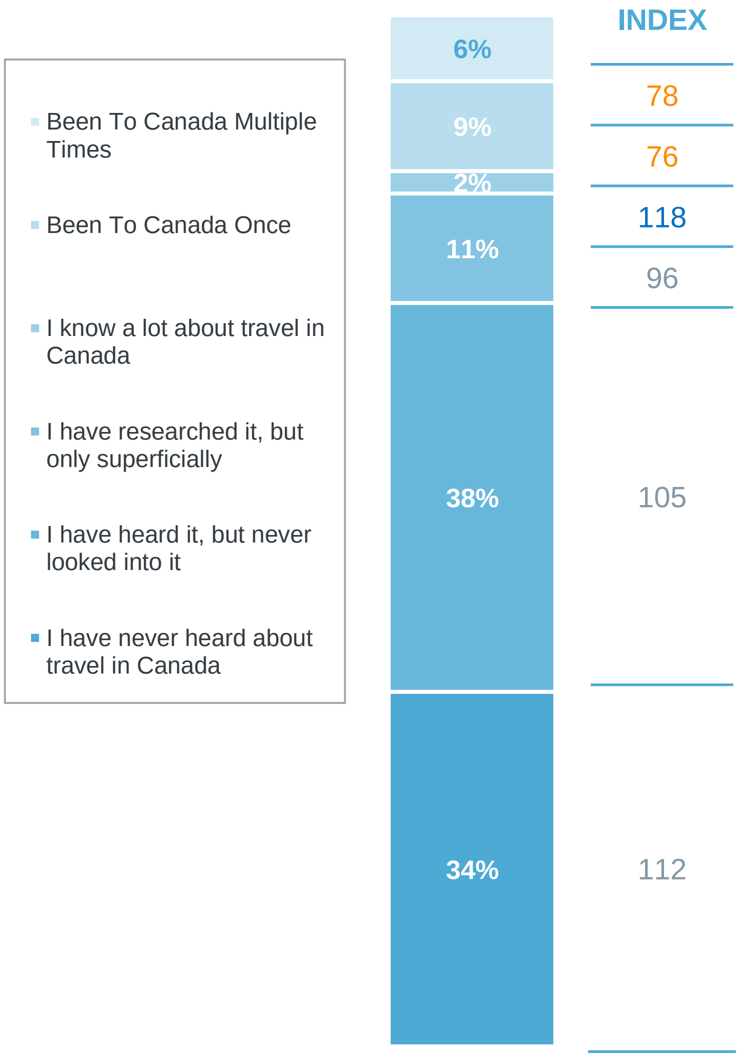
14% Been to Canada in last 5 years

68 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 are prioritizing our spending on our homes and continuing to build our savings.

MAJOR LIFE EVENTS IN LAST 5 YEARS

2%
Had a child
86 INDEX SCORE

8%
Started a new job / career
64 INDEX SCORE

13%
Bought a new home
71 INDEX SCORE

5%
Moved to a new city
109 INDEX SCORE

17%
Child started school
95 INDEX SCORE

32%
Purchased a car
77 INDEX SCORE

12%
Retired
150 INDEX SCORE

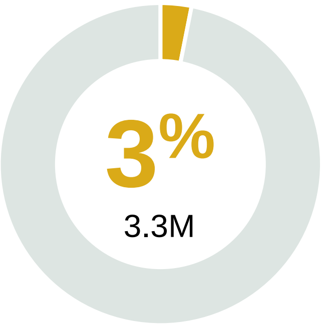
29%
Renovated house
88 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**74%**	91
Personal care and wellness	**44%**	112
Savings and investments	**44%**	127
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	**28%**	83
Fashion and accessories	**28%**	71
Experiences (e.g., concerts, events)	**27%**	91

FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



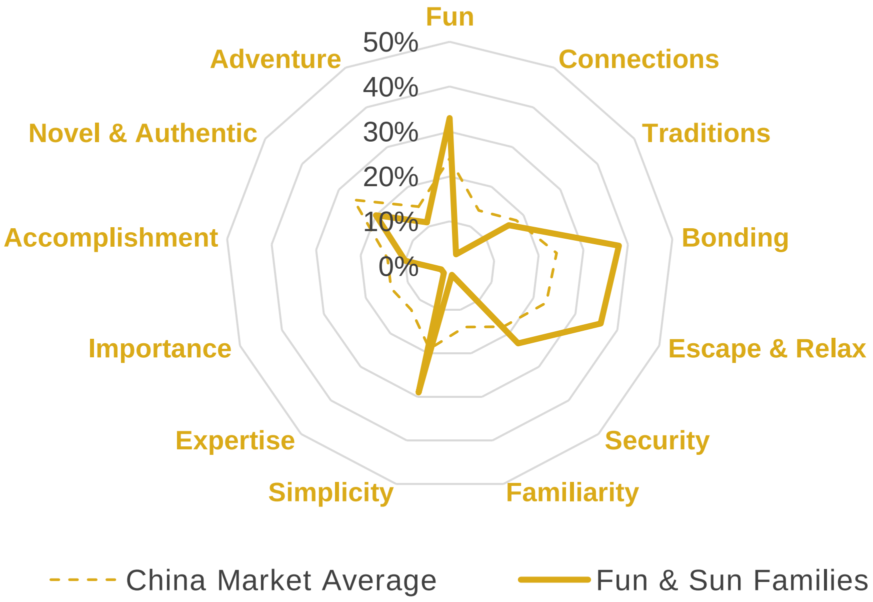
% OF CHINA POPULATION

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.
2. Our trips are escapes from everyday life, focusing on creating lasting memories through fun and simple activities.
3. Destinations built for tourism, offering safe and reliable experiences and weather, make planning for large groups easier.
4. While we generally prefer to stay in our comfort zone, we are excited to explore local shopping and cuisine when we travel.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

71

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

59

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 ease and relaxation, we choose practical, easily accessible hotspots.
- We seek safe and friendly places, and escaping everyday life is our form of indulgence.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally avoid places that are challenging or difficult to reach	**85%**	151
I generally stick to the most popular areas when I visit somewhere	**83%**	140
I'm always on the look out for new destinations to visit next	**82%**	125
I prefer destinations with well-established tourist infrastructure	**82%**	139
I don't generally seek out luxury experiences while travelling	**82%**	143
I prefer destinations with lots of distractions and things to do	**80%**	129
I generally only choose destinations with comfortable climate and weather conditions	**80%**	140
While travelling I generally stick to places that are direct and convenient to get to	**79%**	155
Videos and pictures on social media inspire me to travel	**76%**	129
I generally don't try to learn local languages	**69%**	152
I will generally not go out of my way to buy local when travelling	**64%**	143
I generally don't participate in physical activities during my holidays	**62%**	135
I generally don't seek out destinations in order to explore my ancestral heritage	**61%**	145

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	**55%**	149
To share quality time with others	**52%**	139
To enjoy simple, straightforward travel	**49%**	159
To find much-needed time to relax	**44%**	146
To feel safe and secure	**37%**	157
To escape the demands of everyday life	**22%**	140

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	**68%**	150
Safe	**65%**	148
Fun	**61%**	135
Friendly	**46%**	144
Reliable	**43%**	146
Carefree	**38%**	152

FUN & SUN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are aged 25-44, with at least one child.
- We are likely to be female.
- We are primarily employed earning a medium-high income.

AGE

	SCORE	INDEX
18-34	**33%**	112
35-54	**49%**	132
55+	**18%**	62
MEAN YEARS	**41.9**	69

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	**18%**	86
>$3K to $6K	**70%**	131
More than $6K	**7%**	88
Refused	**5%**	131

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	**83%**	131
Employed PT	**2%**	102
Self-employed	**6%**	86
Retired	**7%**	65

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	90
Secondary education	**10%**	61
Post-secondary education	**90%**	139

53%
60 Have a valid passport

GENDER

44%	58	Male
56%	142	Female
0%		Non-binary / Other

HOUSEHOLD

79%	141	Children <18 Living At Home*
11%	80	Children 18+ Living At Home*
5%	59	Children NOT Living At Home*
16%	61	No Children

** Option is not exclusive*

CHINA CITY BREAKOUT

	SCORE	INDEX
Shanghai	**23%**	95
Shenzhen	**16%**	131
Guangzhou	**15%**	136
Beijing	**11%**	94
Chengdu	**10%**	160
Xi’an	**8%**	147

	SCORE	INDEX
Shenyang	**5%**	78
Nanjing	**5%**	41
Hangzhou	**3%**	64
Qingdao	**3%**	61
Suzhou	**2%**	44

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

59

TRAVEL TRADE INDEX: **GROUP**

41

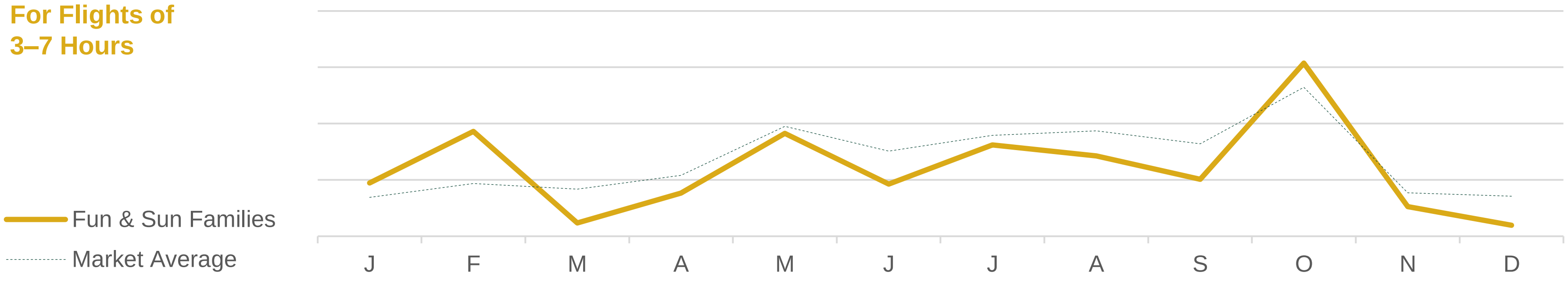
! **KEY** terminology on this page

- **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

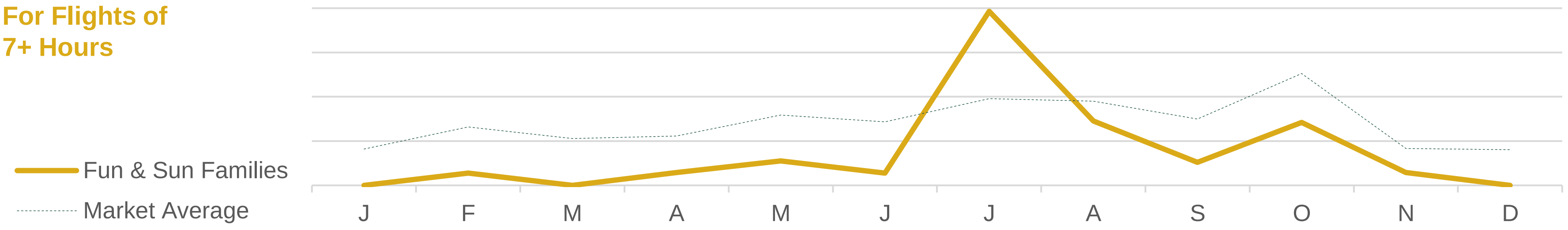
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	70%	139
3-5 Days	34%	90
1 Week Holiday	14%	74
2 Weeks Holiday	3%	55
3 Weeks Or More	1%	48

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	59%	127
International Leisure	9%	61
Business Trip	14%	76
Added Personal To Business	11%	78
Worked During Vacation	8%	65

Incidence is frequency of 2+ times per year

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**48%**	151
Vacation Rental (e.g., Airbnb, Vrbo)	**28%**	141
Budget Hotel	**26%**	149
Premium Hotel	**18%**	61
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**14%**	102
All-inclusive resort	**12%**	152

THOUGHTS ON INDIGENOUS TRAVEL

36%

68 INDEX SCORE

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

7%

79 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	**60%**	90
You only ever get to know a country by experiencing its culture	**59%**	105
I'm willing to put in the effort while travelling in order to see lesser-known places	**21%**	45
I'm open to visiting destinations with challenging climates or weather conditions	**20%**	60
I'm open to travelling to destinations with limited tourist infrastructure	**18%**	61
I like to explore places that are off the beaten path and less explored	**17%**	60

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel in larger groups, with immediate family, extended family, and even friends.
- We keep budgets conservative.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**82%**	134
Kids	**69%**	144
Adult relatives	**24%**	150
Friends	**10%**	86
Solo	**5%**	65

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,040

74
INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	**61%**	91
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**56%**	85
I consider the impact that I personally have on the destinations I visit	**46%**	65
Hearing from underrepresented communities is an important part of travelling	**37%**	62
It's important for me to know that the money I spend will support the local economy I'm visiting	**36%**	57

73%

PRIORITIZE SUSTAINABLE TRAVEL

53 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.
- We like to explore local cuisine and shopping, and explore various water attractions, from beaches to spa opportunities.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	**82%**	156
○ Amusement parks or theme parks	**75%**	155
○ Zoos or aquariums	**62%**	156
○ Space or science centres	**29%**	153
Local cuisine	**66%**	129
○ Street cuisine	**59%**	136
○ Local restaurants	**47%**	129
Nature experiences	**58%**	152
○ Oceanside beaches	**35%**	153
○ See or explore lakes, rivers, or waterfalls	**30%**	154
Shopping	**42%**	139
○ Visiting famous shopping centres or areas	**31%**	137
○ Souvenir shopping	**27%**	136
Health and wellness	**28%**	145
○ Sauna or steam bath	**17%**	154
○ Outdoor hot tub or bath	**15%**	135
Water-based sports	**16%**	139
Guided tours	**18%**	128
Cultural experiences or attractions	**43%**	111
Overnight experiences	**21%**	109
Casual sports	**19%**	74
Festivals and events	**14%**	76
Nightlife	**11%**	100

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 relax and unwind	**84%**	137	**58%**	95
To spend time with family	**80%**	142	**89%**	150
To escape from routine	**34%**	154	**17%**	113
To have fun with friends	**10%**	70	**12%**	101
To learn through other cultures	**36%**	125	**16%**	57
To have memories from top travel spots	**20%**	87	**0%**	38
For a romantic getaway	**17%**	61	**42%**	144
To check off dream travel places	**7%**	60	**0%**	47
To seek solitude and isolation	**0%**	57	**0%**	59

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	**69%**	126	**94%**	149
Kids wanted to go	**82%**	150	**84%**	153
Family / friends wanted to go	**49%**	139	**17%**	83
Special event (e.g., wedding, reunion)	**30%**	135	**28%**	127
Visiting friends / family	**17%**	84	**0%**	54
Festival or event	**33%**	115	**16%**	64

56% 143 INDEX SCORE

Travel aligns with children’s school schedule

62% 121 INDEX SCORE

Take time off for vacation during major holidays

29% 96 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 in advance and secure accommodation early. Destinations are often selected at our kids requests.

89%

Primary Trip Planner

78
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**
*The incidence of this traveller segment taking recent trips of the flight duration indicated above resulted in a base size too small for statistically reliable analysis.		*The incidence of this traveller segment taking recent trips of the flight duration indicated above resulted in a base size too small for statistically reliable analysis.

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

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips primarily feature destinations known for family attractions.

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

50% 147 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Nuclear Family		
DESTINATION TYPE	Eco-tourism spot	**21%**	
	Urban centre	**20%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Street cuisine	**51%**	
	Amusement parks or theme parks	**48%**	
KEY BEHAVIOURS	Planned within a month of travel. Lower budget. All about fun and connecting as a family		

% OF TOTAL TRIPS

24% 110 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Extended Family		
DESTINATION TYPE	Urban centre	**29%**	
	Cultural experience	**21%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Simplicity
ACTIVITIES	Local restaurants	**52%**	
	Observing architecture	**32%**	
	Zoos or aquariums	**31%**	
KEY BEHAVIOURS	Higher budget, may be staying at an all-inclusive resort. Planned in advance due to larger group		

% OF TOTAL TRIPS

N/A N/A INDEX SCORE

SEGMENT ALIGNMENT

○ ○ ○ ○ ○

TRIP TYPE	BASE SIZE TOO SMALL		
COMPANIONS			
TRIP EMOTIONAL MOTIVATIONS			
ACTIVITIES			
KEY BEHAVIOURS			

% OF TOTAL TRIPS

N/A N/A INDEX SCORE

SEGMENT ALIGNMENT

○ ○ ○ ○ ○

TRIP TYPE	BASE SIZE TOO SMALL		
COMPANIONS			
TRIP EMOTIONAL MOTIVATIONS			
ACTIVITIES			
KEY BEHAVIOURS			

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are kid-friendly, easy to access, built for tourism, and have affordable options.
- We take shorter trips, 1-week long or less, mostly domestic.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
China	**72%**	140	Singapore	**2%**	80
Japan	**8%**	110	France	**2%**	73
Hong Kong	**4%**	95	Macao	**2%**	94
US	**3%**	141	New Zealand	**2%**	110
Australia	**2%**	83	Switzerland	**2%**	147

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	**64%**	142
Has well-developed tourism infrastructure	**47%**	160
Has a mild and pleasant climate	**46%**	147
Has adequate health standards	**40%**	156
Is easy to travel to	**37%**	143
Is not too expensive	**33%**	138
Provides a sense of personal safety	**32%**	139
Isn’t too crowded	**30%**	135

FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

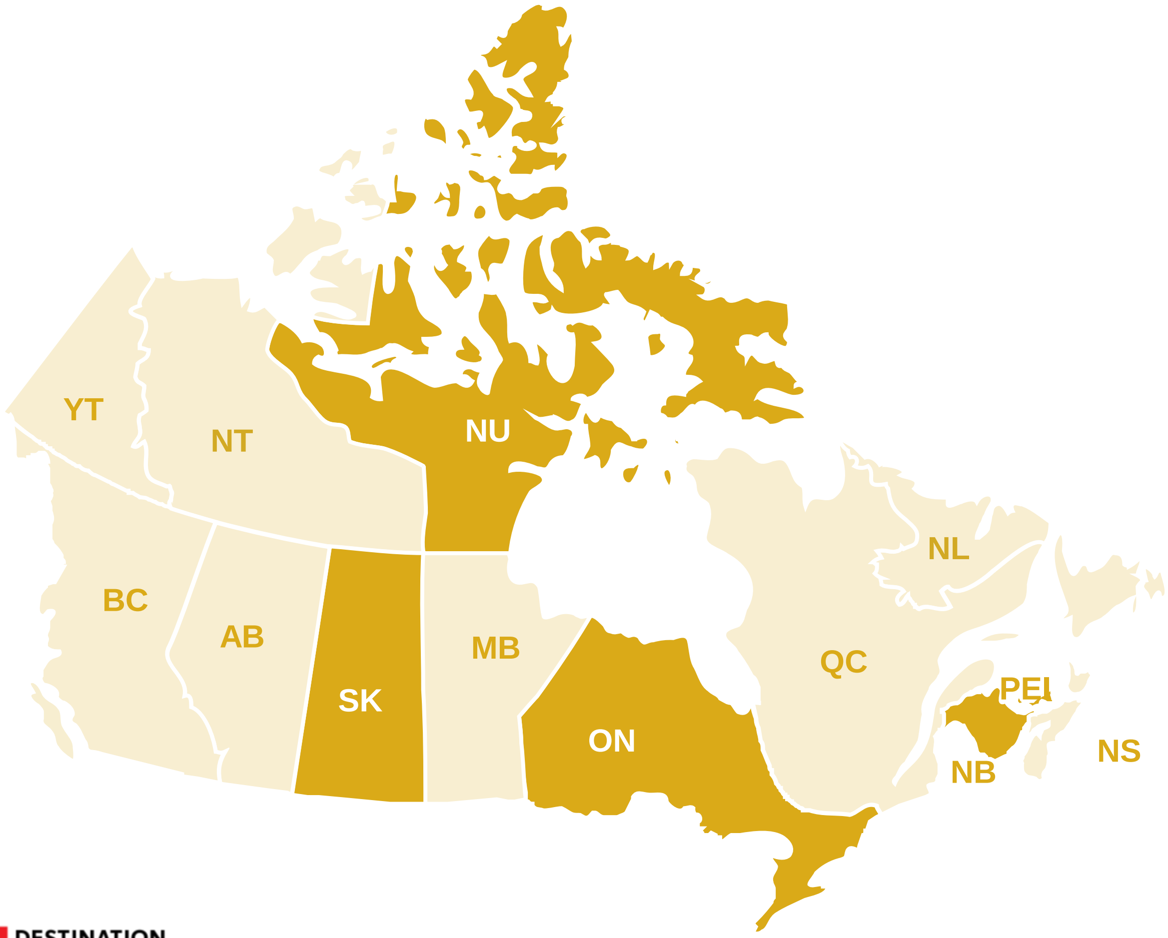
- We likely have not been to Canada before.
- To date, any travel to Canada has primarily been to Ontario or Atlantic provinces.

WHERE DO WE WANT TO GO IN CANADA

MONTREAL
VANCOUVER
BANFF NATIONAL PARK
CALGARY
TORONTO
NIAGARA FALLS
OTTAWA
YELLOWKNIFE
QUEBEC

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	8%	108
BC	0%	56
MB	0%	41
NB	17%	143
NL	17%	81
NS	8%	74
NT	8%	57
NU	24%	155
ON	43%	142
PEI	25%	146
QC	8%	68
SK	8%	126
YT	0%	69

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- While we have heard of Canada, we have never really looked into it as a travel destination.
- Generally, we are not planning a future visit.

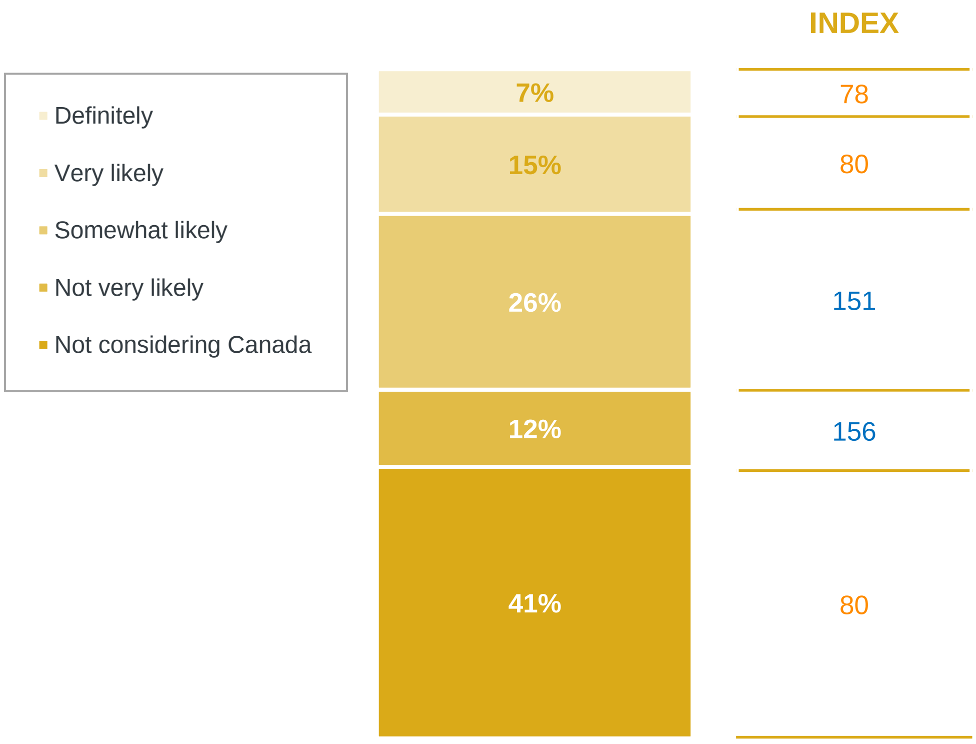
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	**15%**	**18%**	**59%**	**16%**
VS. TOTAL MARKET	14%	31%	46%	20%

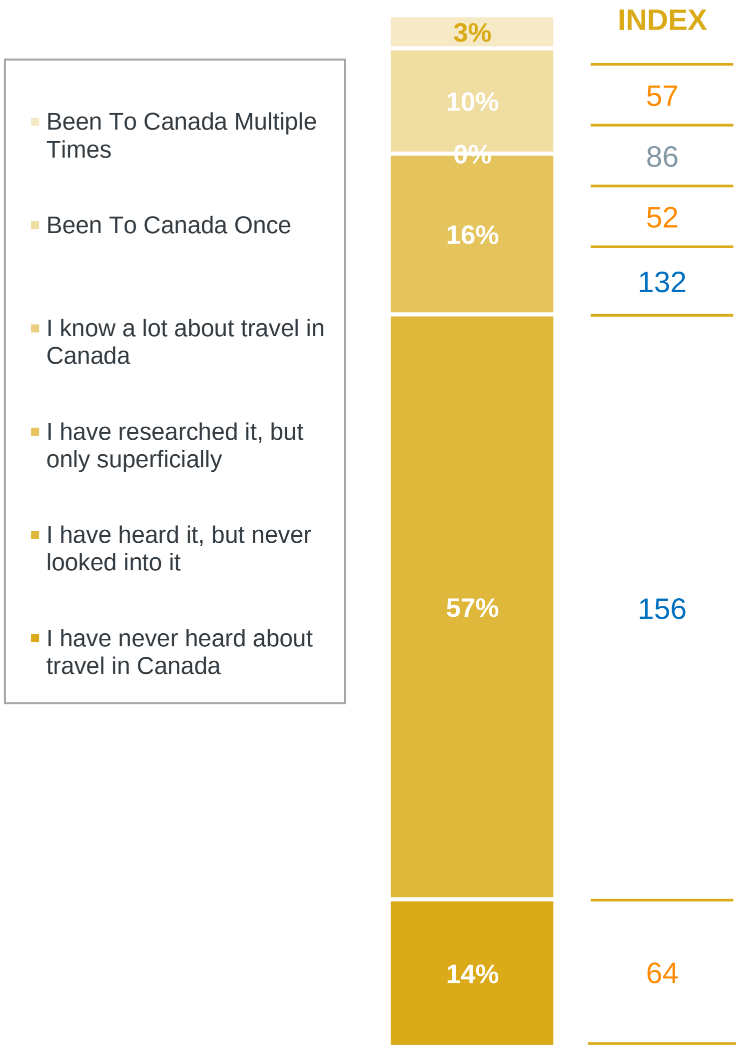
12% Been to Canada in last 5 years

60 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



FUN & SUN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Our spending priorities include a range of categories to account for all family members, but we are also focussed on growing our savings.
- If we did not just have a child, our young children are transitioning from daycare to school life.

MAJOR LIFE EVENTS IN LAST 5 YEARS

22%
Had a child
159 INDEX SCORE

16%
Started a new job / career
126 INDEX SCORE

15%
Bought a new home
81 INDEX SCORE

4%
Moved to a new city
97 INDEX SCORE

50%
Child started school
150 INDEX SCORE

48%
Purchased a car
118 INDEX SCORE

2%
Retired
77 INDEX SCORE

37%
Renovated house
117 INDEX SCORE

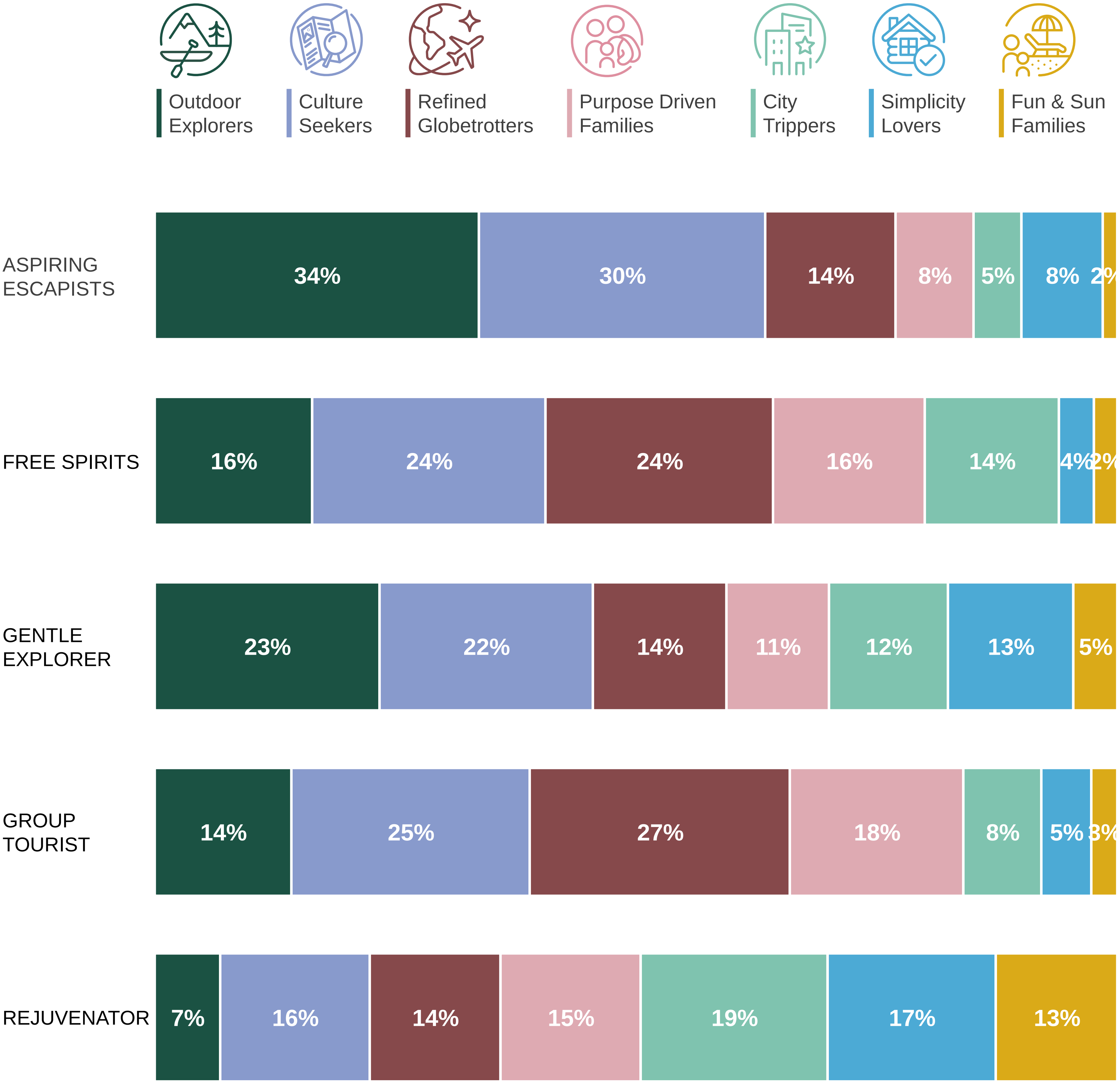
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	63%	55
Savings and investments	52%	151
Personal care and wellness	48%	129
Fashion and accessories	42%	121
Technology and gadgets	27%	130
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	26%	65

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.*

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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.*

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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	

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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).