GERMANY MARKET PROFILES

Germany stands as Europe's largest travel market, driven by a deep passion for international exploration and cultural discovery.

German travellers embrace longer trips that blend nature-based activities with opportunities to learn and connect with new environments. They often favour destinations that offer both security and a welcoming atmosphere, while seeking to escape the crowds in favour of friendly and sociable experiences. Independent and discerning, German travellers prioritize destinations that resonate personally, valuing authenticity over popularity.

GERMANY

DESTINATION CANADA

A GUIDE

TO UNDERSTANDING THE PROFILE

THE STRUCTURE

HOW TO READ THE DATA

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

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

FOR EXAMPLE:

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

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

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

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

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

KEY DEFINITIONS

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

! **KEY** terminology on this page…

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

MARKET OVERVIEW

KEY MARKET HIGHLIGHTS

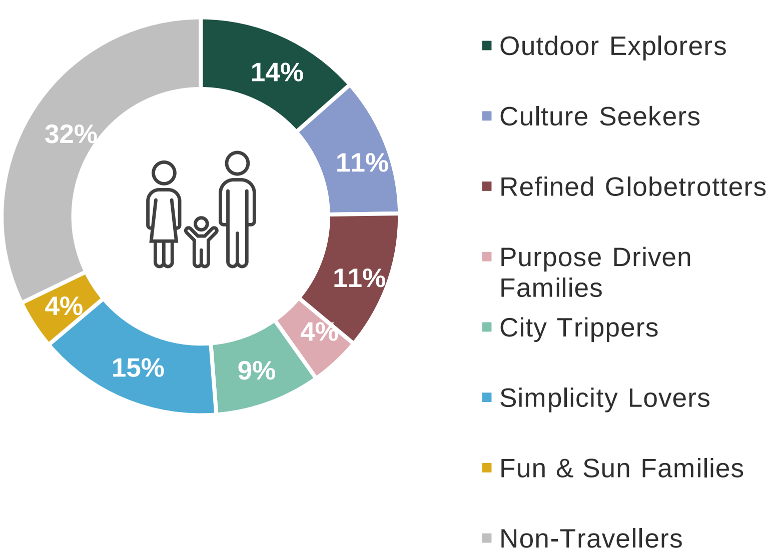
- Overall interested in getting outdoors and exploring nature across all segments.
- Prefer quieter locales away from crowds, and generally more open to independent travel without assistance and a little more effort to reach these experiences.
- Generally seeking safe, secure, and straightforward travel experiences. Less inclined to seek luxury and are more attracted to practical and reliable elements.

The German travel market overindexes in Outdoor Explorers and Simplicity Lovers, with a relatively small proportion of Non-travellers. German travellers are avid nature enthusiasts, with a strong preference for nature-based activities and casual sports like hiking and cycling. They are motivated by a desire for personal growth and exploration, often selecting off-the-beaten-path locations with limited infrastructure.

Germans take pride in their independence and are largely uninfluenced by social trends, opting instead for destinations that align with their own values and preferences.

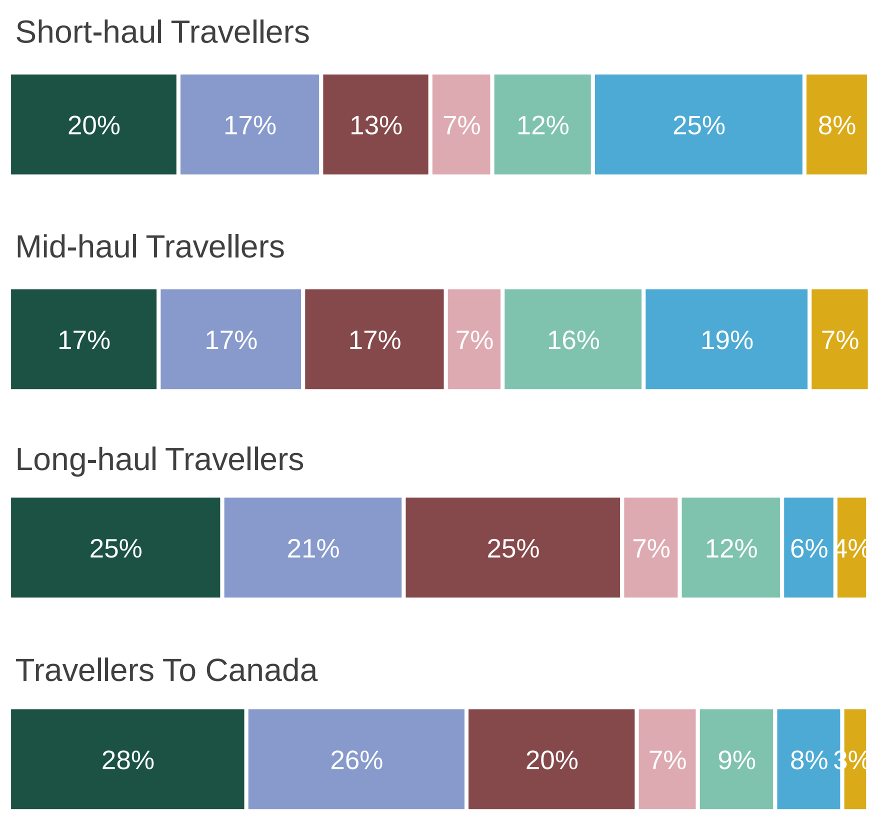
MARKET SIZING

POPULATION BREAKDOWN



32.1% of the adult population in Germany (est. **69M**) are non-travellers (est. **22M**). Reasons for not travelling are often financial or lack of interest in travelling.

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

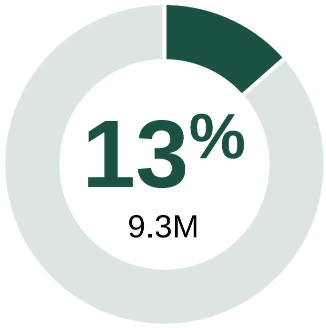
	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	**9.3M**	**Yes**	o Nature Experiences o Casual Sports o Water Sports	o Novel & Authentic o Adventure o Connections
CULTURE SEEKERS	**7.8M**	No	o Cultural Experiences & Attractions o Festivals & Events o Cuisine	o Novel & Authentic o Connections o Familiarity
REFINED GLOBETROTTERS	**7.8M**	**Yes**	o Cuisine o Cultural Experiences & Attractions o Nature Experiences	o Novel & Authentic o Security o Fun
PURPOSE DRIVEN FAMILIES	**2.9M**	No	o Family-Focussed Attractions o Nature Experiences o Cultural Experiences & Attractions	o Connections o Bonding o Traditions
CITY TRIPPERS	**6.0M**	No	o Shopping o Cuisine o Cultural Experiences & Attractions	o Fun o Security o Escape & Relax
SIMPLICITY LOVERS	**10.5M**	No	o Nature Experiences o Cuisine o Health & Wellness	o Escape & Relax o Security o Simplicity
FUN & SUN FAMILIES	**2.8M**	No	o Family-Focussed Attractions o Shopping o Nature Experiences	o Escape & Relax o Bonding o 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 GERMANY POPULATION

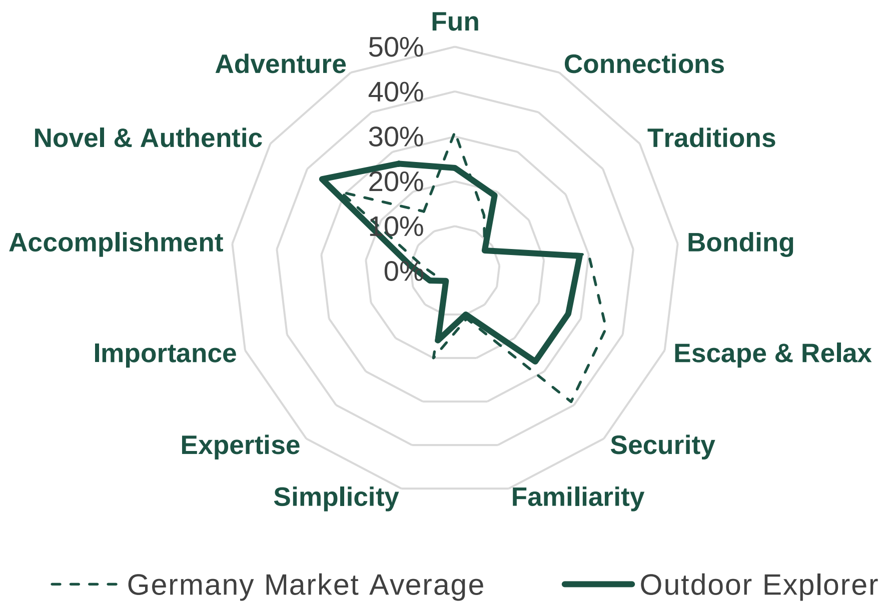
We are daring explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

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

WHAT YOU NEED TO KNOW ABOUT ME

1. We love travel and take all types of trips (domestic / international / business / bleisure).
2. We are nature enthusiasts driven by a sense of accomplishment from overcoming challenges in the great outdoors.
3. Activity and sports help us relax, and it's our version of self-care.
4. Like to get off the beaten path, open to visiting places with less infrastructure and more challenging climates.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

114

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

107

How is this calculated?

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

OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- Travel is an important milestone of personal growth, and we prioritize engaging with the unexplored.
- Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment.
- We prioritize unique, adventurous, free-spirited, and unexplored destinations.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm passionate about travelling	88%	117
I don't generally seek out luxury experiences while travelling	81%	108
I'm always on the look out for new destinations to visit next	77%	123
I prefer planning my trips independently and don't consult travel agencies	77%	109
I like my holiday to have some form of physical activity	75%	149
Exploring the world through travel is an important milestone of growing up	73%	122
I generally think natural attractions are the highlights of my trip	72%	143
I go where I want to go, no matter the hurdles	71%	130
When I travel to natural environments it makes me reflect on how fortunate I am	70%	127
I'm open to unconventional accommodations when travelling	57%	139
I feel best on vacation when being highly active	52%	133
I like to keep my travel plans flexible and often book on short notice	47%	134
I'd be open to using AI-powered chatbots for travel planning and assistance	36%	128

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	40%	122
To feel a sense of adventure	38%	146
To feel connected with new people	19%	113
To push my limits and challenge myself	16%	147
To be proud to share my travel experiences	16%	128
To feel like I'm important	6%	114

DESIRED DESTINATION

	SCORE	INDEX
Adventurous	51%	151
Authentic	41%	113
Unique	36%	134
Passionate	20%	135
Unexplored	18%	146
Free-Spirited	17%	129

OUTDOOR EXPLORERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are likely under 35 years of age and generally don't have children in the household.
- We are working full-time and have a comfortable net worth.
- Find us primarily in more populated cities.

AGE

	SCORE	INDEX
18-34	34%	120
35-54	32%	99
55+	35%	89
MEAN YEARS	45.8	83

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	21%	100
>$3K to $5K	66%	101
More than $5K	10%	106
Refused	3%	74

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	53%	116
Employed PT	11%	99
Self-employed	5%	103
Retired	17%	79

EDUCATION

	SCORE	INDEX
Primary education or less	14%	93
Secondary education	51%	107
Post-secondary education	35%	95

73%
103 Have a valid passport

GENDER

56% 115 Male

44% 83 Female

1% 153 Non-binary / Other

HOUSEHOLD

23% 98 Children <18 Living At Home*

6% 87 Children 18+ Living At Home*

21% 81 Children NOT Living At Home*

56% 113 No Children

** Option is not exclusive*

GERMANY STATE BREAKOUT

	SCORE	INDEX
Nordrhein-Westfalen	23%	110
Bayern	18%	107
Baden-Württemberg	12%	82
Niedersachsen	11%	133
Berlin	10%	127
Hessen	8%	97

	SCORE	INDEX
Hamburg	4%	122
Mecklenburg-Vorpommern	4%	128
Schleswig-Holstein	3%	89
Brandenburg	3%	87
Rheinland-Pfalz	2%	73

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

85

TRAVEL TRADE INDEX: **GROUP**

116

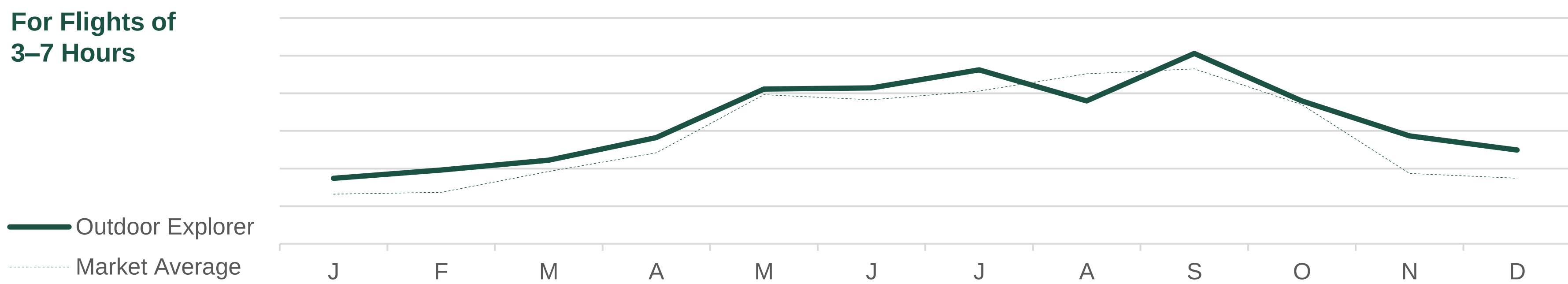
KEY terminology on this page

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

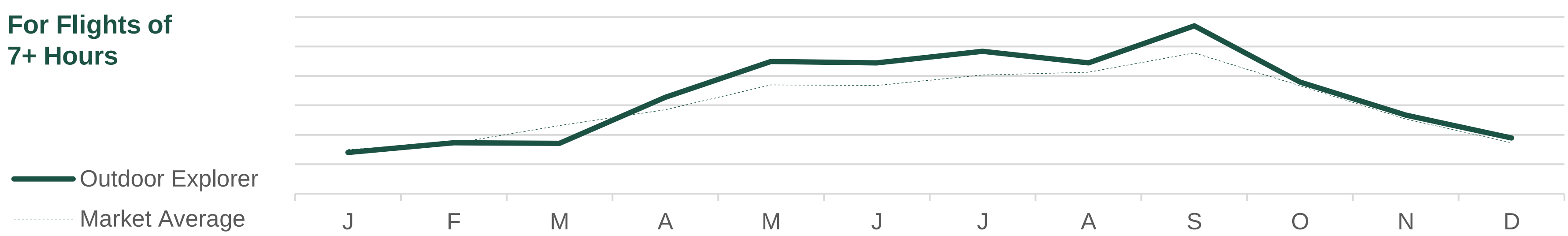
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	39%	124
3-5 Days	22%	107
1 Week Holiday	16%	115
2 Weeks Holiday	12%	112
3 Weeks Or More	7%	126

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	34%	102
International Leisure	28%	117
Business Trip	10%	103
Added Personal To Business	7%	116
Worked During Vacation	7%	111

Incidence is frequency of 2+ times per year

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**48%**	105
Vacation Rental (e.g., Airbnb, Vrbo)	**35%**	117
All-inclusive resort	**16%**	95
Premium Hotel	**15%**	91
Budget Hotel	**14%**	105
Campsite	**11%**	132

THOUGHTS ON INDIGENOUS TRAVEL

64%

121 INDEX SCORE

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

8%

113 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I'm open to travelling to destinations with limited tourist infrastructure	**78%**	138
I like to explore places that are off the beaten path and less explored	**77%**	135
You only ever get to know a country by experiencing its culture	**73%**	101
I really want to learn about the history of the destinations I visit	**69%**	113
I'm willing to put in the effort while travelling in order to see lesser-known places	**69%**	132
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 sometimes alone.
- Our budgets are moderate, though we may spend on experiences.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**59%**	88
Solo	**17%**	104
Friends	**17%**	116
Kids	**14%**	96
Adult relatives	**12%**	74

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,810

117
INDEX SCORE

SPEND STYLE

Mid-range to Premium

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**60%**	110
I consider the impact that I personally have on the destinations I visit	**49%**	106
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**47%**	121
Hearing from underrepresented communities is an important part of travelling	**42%**	116
It's important to me that I visit somewhere that is open to diversity and inclusion	**39%**	95

46%

PRIORITIZE SUSTAINABLE TRAVEL

109 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 mountains and backcountry, we're not deterred by a challenge.
- Guided tours that provide unique and novel access to nature are attractive.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	73%	139
○ See or explore lakes, rivers, or waterfalls	44%	145
○ Hiking	41%	145
○ Explore wilderness or backcountry	29%	152
Casual sports	26%	144
○ Casual biking	19%	145
○ Fishing	5%	115
Water-based sports	22%	146
○ Swimming	15%	150
○ Kayaking, canoeing, or paddle-boarding	8%	148
Winter-based sports	19%	140
○ Snowboarding or downhill skiing	13%	141
○ Snowshoeing or cross-country skiing	5%	134
High-intensity sports	9%	140
○ Mountain biking	4%	132
○ Rock climbing	3%	136
Cultural experiences or attractions	44%	86
Local cuisine	37%	60
Guided tours	26%	113
Health and wellness	27%	93
Festivals and events	19%	99
Family-focussed attractions	20%	92
Overnight experiences	16%	101

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	**55%**	77	**56%**	83
For adventure and excitement	**37%**	140	**43%**	129
To learn through other cultures	**43%**	129	**43%**	109
To spend time with family	**18%**	77	**20%**	88
To escape from routine	**17%**	82	**21%**	100
To have fun with friends	**17%**	96	**13%**	90
For personal reflection and growth	**19%**	114	**21%**	114
To be pampered	**22%**	81	**27%**	100
To check off dream travel places	**20%**	124	**17%**	90

EXTERNAL TRIP TRIGGERS

	SCORE	**INDEX**	**SCORE**	**INDEX**
Partner / spouse wanted to go	**56%**	112	**44%**	97
Family / friends wanted to go	**40%**	122	**18%**	96
Visiting friends / family	**19%**	77	**25%**	89
Special event (e.g., wedding, reunion)	**12%**	78	**14%**	103
Festival or event	**18%**	110	**14%**	92
Kids wanted to go	**19%**	97	**12%**	98

20% 94 INDEX SCORE

Travel aligns with children's school schedule

24% 95 INDEX SCORE

Take time off for vacation during major holidays

15% 120 INDEX SCORE

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

OUTDOOR EXPLORERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

63%

Primary Trip Planner

117
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**	TIMELINE	FLIGHT OF **7+ HOURS**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 4.7 months** ○ Travel provider websites ○ Travel booking sites/apps
Started Researching and Planning – 3.2 months ○ Travel booking sites/apps ○ Travel guidebooks	**4 MONTHS** BEFORE MY TRIP	**Booked Transportation – 3.5 months** ○ Travel booking sites/apps **Booked Accommodation – 3.4 months** ○ Travel booking sites/apps
	3 MONTHS BEFORE MY TRIP	
Booked Accommodation – 2.6 months ○ Travel booking sites/apps **Booked Transportation – 2.4 months** ○ Travel booking sites/apps **Booked Activities – 1.7 months** ○ Direct with company	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 2.3 months** ○ Travel booking sites/apps
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips are to adventure and nature destinations.
- At times we take trips like Refined Globetrotters 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 10% — 119 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Wildlife & Nature Reserve		
COMPANIONS	Couple only		**46%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Escape & Relax	Adventure
ACTIVITIES	Nature walks		**45%**
	Hiking		**43%**
	Explore wilderness		**40%**
KEY BEHAVIOURS	Seeking unique natural wonders and destinations away from crowds		

% OF TOTAL TRIPS 6% — 96 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Adventure Destination		
COMPANIONS	Couple only		**39%**
	Nuclear family with kids		**26%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Adventure	Novel & Authentic
ACTIVITIES	Visiting nature parks or preserves		**21%**
	Explore wilderness		**20%**
	Casual biking		**16%**
KEY BEHAVIOURS	Seeking excitement and adventure in nature. Staying in a vacation rental		

% OF TOTAL TRIPS 43% — 149 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		**24%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Local restaurants		**44%**
	Oceanside beaches		**25%**
	Visiting local monuments		**24%**
KEY BEHAVIOURS	More relaxed trip to a mild climate, seeking indulgence and pampering		

% OF TOTAL TRIPS 17% — 100 INDEX SCORE

SEGMENT ALIGNMENT ●●○○○

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		**26%**
	Small cities and town		**16%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Security	Novel & Authentic
ACTIVITIES	Local restaurants		**43%**
	Museums		**27%**
	Cafés or bakeries		**27%**
KEY BEHAVIOURS	Want to explore something new in a safe and welcoming city		

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 closer to home around Europe, and take international trips about once a year or more.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Germany	24%	84	US	4%	122
Spain	9%	99	Greece	4%	92
Austria	6%	115	Norway	4%	143
Italy	6%	79	Denmark	3%	115
France	5%	98	Netherlands	3%	100

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Provide access to unique natural wonders	50%	146
Known for stunning natural landscapes	48%	140
Provides numerous opportunities for outdoor adventures	37%	151
Provides opportunities to view wildlife in its natural habitat	32%	145
Offers a range of scenic viewpoints	24%	135
Provides a remote, no-frills experience	13%	139
Offers an eccentric and unique atmosphere	11%	122
Offers options for adrenaline seekers	9%	146

OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

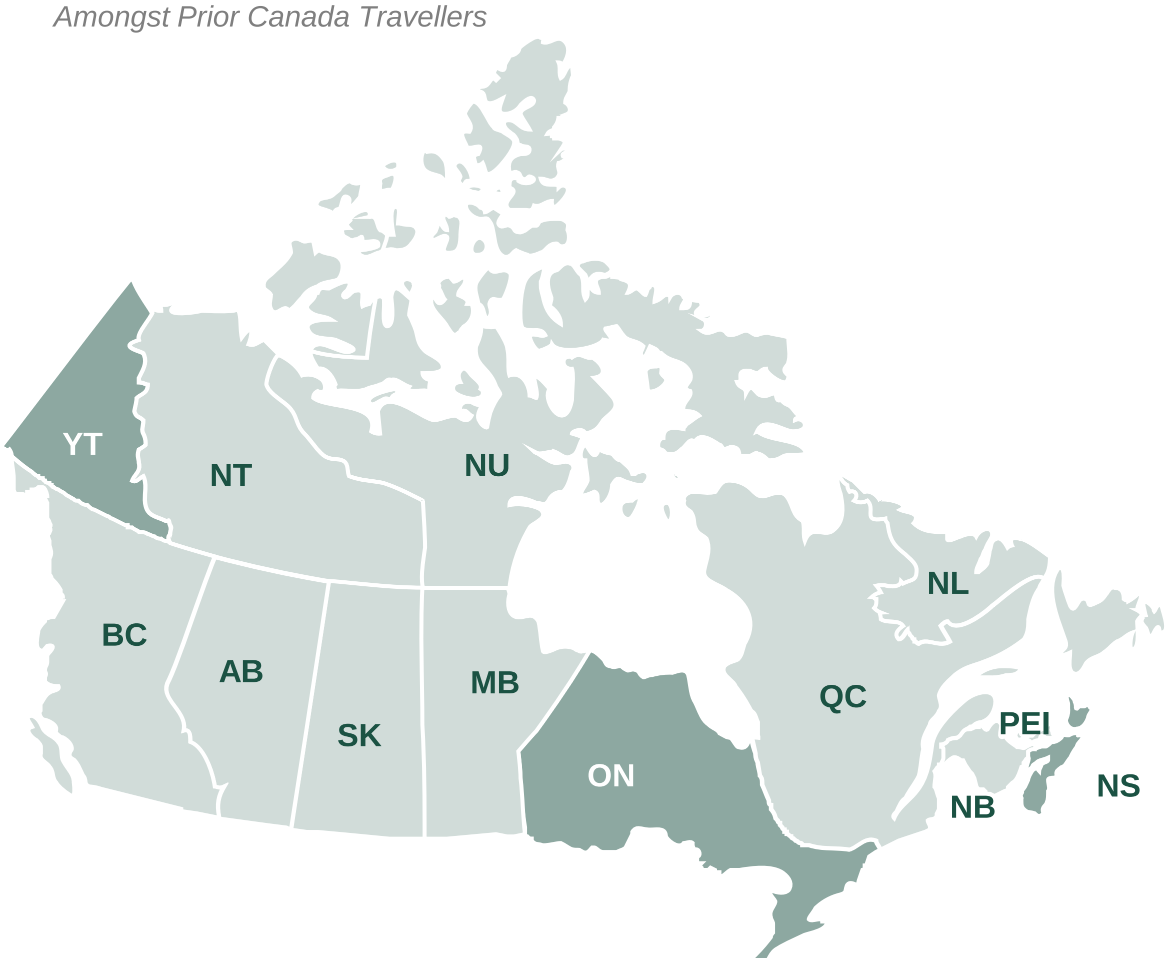
OVERALL INSIGHT

- We may have been to Canada before, but perhaps not recently.
- We overindex on propensity to have visited British Columbia and the Territories.
- Future trips to Canada may include Toronto or Vancouver. We also think about specific attractions like national parks.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	19%	95
BC	38%	114
MB	7%	106
NB	8%	97
NL	7%	103
NS	11%	100
NT	5%	101
NU	5%	108
ON	49%	122
PEI	2%	83
QC	21%	84
SK	5%	94
YT	9%	123

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- We will travel in all seasons, but more likely in the summer season.
- If we have visited, it's been 1-2 times so far, but planning for more.
- Those of us who haven't visited, are considering it in the future, and have already done some detailed research about Canada.

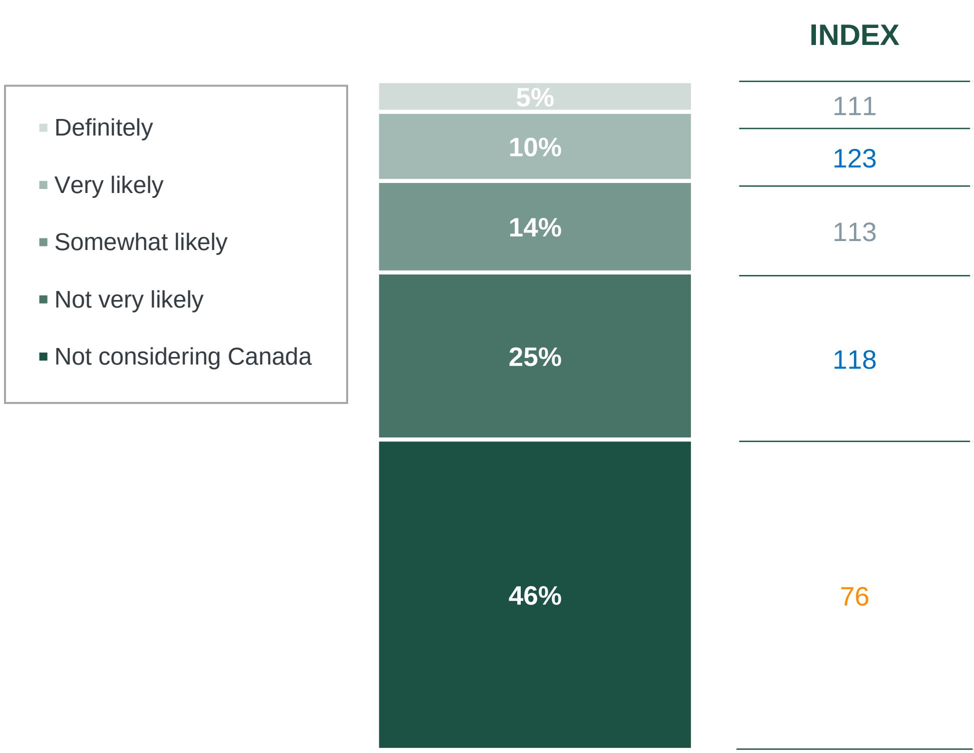
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	**13%**	**31%**	**43%**	**22%**
VS. TOTAL MARKET	12%	30%	48%	26%

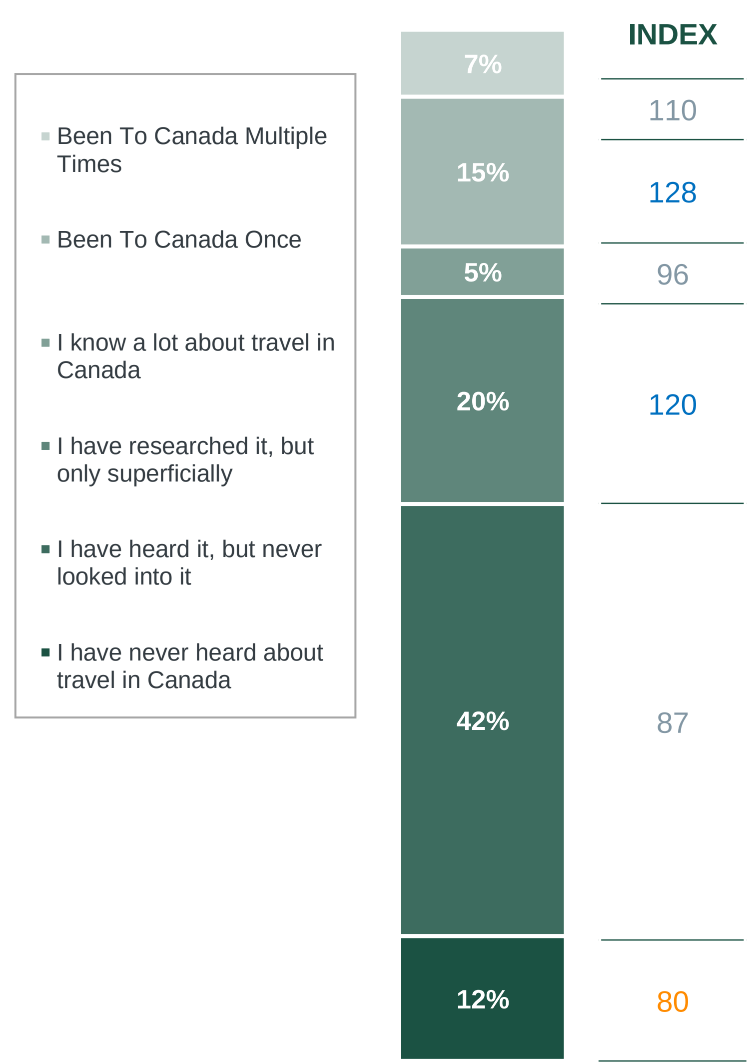
9% Been to Canada in last 5 years

116 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Recent life changes have included a career move and/or moving to a new city.
- Beyond travel, our extra income in spent on technology, hobbies, and interests.

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%
Had a child
99 INDEX SCORE

24%
Started a new job / career
108 INDEX SCORE

4%
Bought a new home
103 INDEX SCORE

17%
Moved to a new city
135 INDEX SCORE

5%
Child started school
96 INDEX SCORE

40%
Purchased a car
105 INDEX SCORE

6%
Retired
70 INDEX SCORE

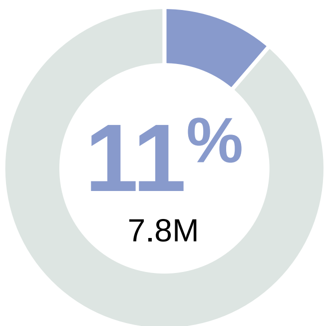
18%
Renovated house
113 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**60%**	104
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**46%**	112
Savings and investments	**39%**	99
Experiences (e.g., concerts, events)	**33%**	103
Personal care and wellness	**33%**	94
Fashion and accessories	**30%**	89

CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



% OF GERMANY POPULATION

We are sociable, free-spirited individuals who seek unique, authentic experiences. We thrive on immersing ourselves in new perspectives, local culture and 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 are open to both short and longer trips. Travel is an investment we make in ourselves.

WHAT YOU NEED TO KNOW ABOUT ME

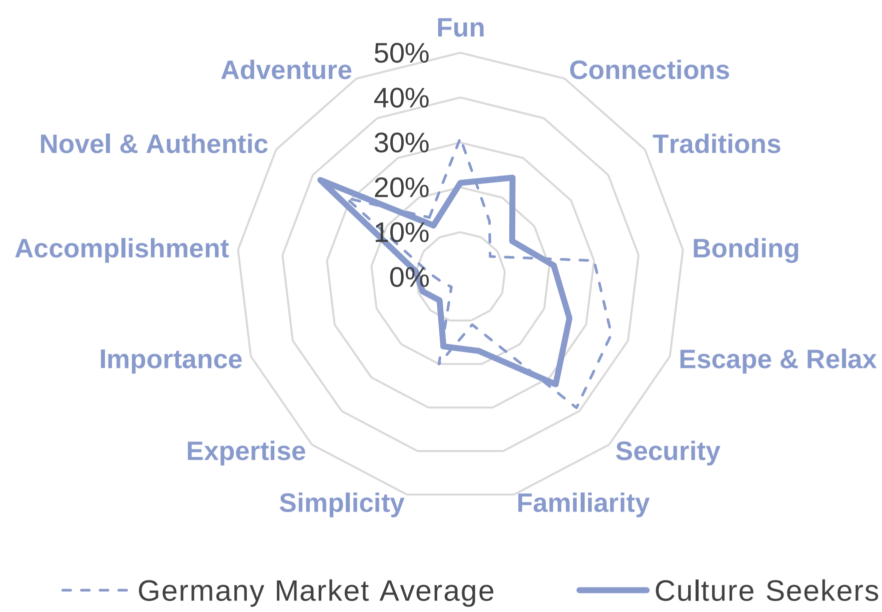
1 We prioritize diversity, inclusion, sustainability and supporting the local economy.

2 We take pride in facing challenges, and value the feeling of accomplishment when we try something different.

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 We take ownership over feeling welcomed in a destination by ensuring we travel responsibly and engage with communities.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

129

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

113

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 want to bond and create lasting memories and want to discover new perspectives.
- We feel best on vacation when we are highly active.
- We are dedicated to responsible travel, ensuring we respect the environment and engage with local communities.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Trying out local cuisine is a really important part of travel	77%	128
I am more likely to select destinations / activities that invest in socially responsible tourism	71%	125
Exploring the world through travel is an important milestone of growing up	70%	116
I like to come back from travels having learnt something new	65%	116
I learn the basics of a language before visiting a country / region	64%	134
I go where I want to go, no matter the hurdles	63%	117
I like natural attractions but I don’t usually think they are the highlights of my trip	56%	120
I’m open to unconventional accommodations when travelling	48%	120
I feel best on vacation when being highly active	45%	120
I like to keep my travel plans flexible and often book on short notice	44%	121
I seek out destinations where I can explore my ancestral heritage	41%	131
I’d be open to using AI-powered chatbots for travel planning and assistance	36%	127
Even while travelling, I like to maintain regular contact with my duties or obligations back home	34%	134

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To open my mind to new perspectives	30%	127
To feel connected with new people	25%	133
To feel like a local	16%	140
To create new, or take part in old, traditions	14%	136
To feel like I’ve accomplished something	11%	129
To feel like I’m important	9%	132

DESIRED DESTINATION

	SCORE	INDEX
Open	36%	131
Accepting	34%	143
Sociable	27%	130
Charming	23%	129
Free-Spirited	18%	133
Unexplored	9%	111

CULTURE SEEKERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We represent a diverse age range and most of us don't have children.
- We are generally employed full-time.
- We are most likely to be found in Nordrhein-Westfalen as well as some more rural regions.

80%
118 Have a valid passport

GENDER

60%	130	Male
40%	72	Female
0%	87	Non-binary / Other

AGE

	SCORE	INDEX
18-34	34%	121
35-54	32%	99
55+	35%	89
MEAN YEARS	45.9	84

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	21%	99
>$3K to $5K	67%	108
More than $5K	9%	101
Refused	3%	79

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	55%	123
Employed PT	6%	81
Self-employed	7%	126
Retired	19%	86

EDUCATION

	SCORE	INDEX
Primary education or less	15%	111
Secondary education	43%	76
Post-secondary education	42%	118

HOUSEHOLD

25%	100	Children <18 Living At Home*
5%	68	Children 18+ Living At Home*
25%	90	Children NOT Living At Home*
50%	105	No Children

** Option is not exclusive*

GERMANY STATE BREAKOUT

	SCORE	INDEX
Nordrhein-Westfalen	23%	112
Bayern	18%	108
Baden-Württemberg	13%	100
Hessen	10%	122
Berlin	8%	111
Niedersachsen	7%	73

	SCORE	INDEX
Schleswig-Holstein	4%	98
Hamburg	4%	122
Mecklenburg-Vorpommern	3%	114
Rheinland-Pfalz	3%	87
Sachsen-Anhalt	3%	86

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

99

TRAVEL TRADE INDEX: **GROUP**

103

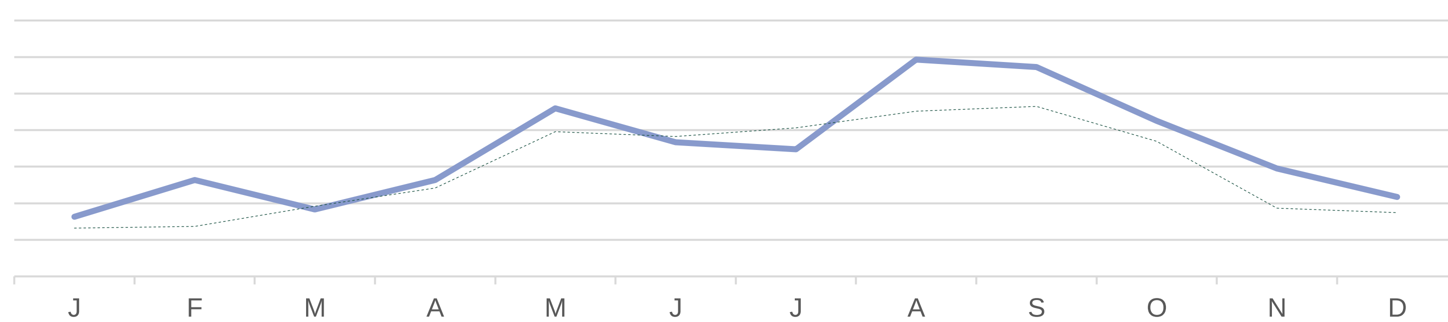
KEY terminology on this page

- **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

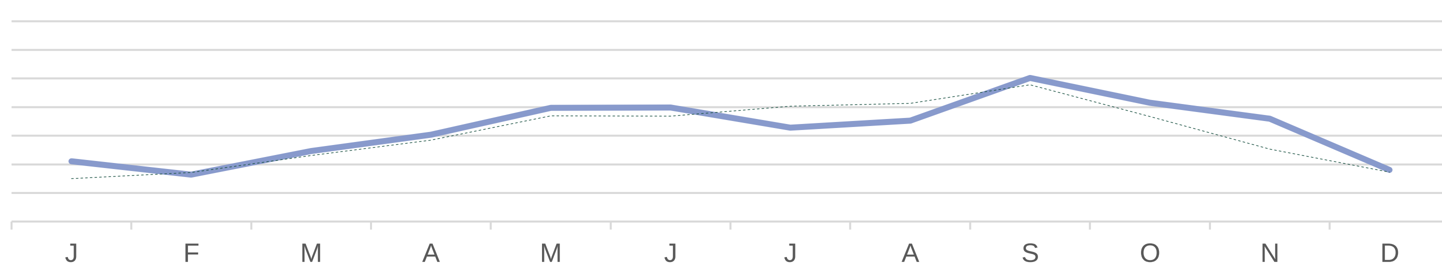
TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



Culture Seekers
Market Average

For Flights of 7+ Hours



Culture Seekers
Market Average

TRIP DURATION

		INDEX
1-2 Days	39%	123
3-5 Days	26%	124
1 Week Holiday	19%	129
2 Weeks Holiday	15%	127
3 Weeks Or More	6%	119

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	32%	85
International Leisure	25%	108
Business Trip	18%	142
Added Personal To Business	8%	126
Worked During Vacation	11%	136

Incidence is frequency of 2+ times per year

CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**51%**	114
Vacation Rental (e.g., Airbnb, Vrbo)	**23%**	77
Premium Hotel	**17%**	96
Budget Hotel	**16%**	113
Friend's or family's place	**15%**	125
All-inclusive resort	**11%**	76

THOUGHTS ON INDIGENOUS TRAVEL

66%

125 INDEX SCORE

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

11%

133 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	**81%**	128
I really want to learn about the history of the destinations I visit	**73%**	119
I like to explore places that are off the beaten path and less explored	**69%**	122
I'm open to travelling to destinations with limited tourist infrastructure	**64%**	109
I'm willing to put in the effort while travelling in order to see lesser-known places	**60%**	118
I'm open to visiting destinations with challenging climates or weather conditions	**45%**	124

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**49%**	62
Solo	**29%**	144
Adult relatives	**14%**	90
Friends	**12%**	97
Kids	**12%**	94

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,330

103
INDEX SCORE

SPEND STYLE

Mid-range to Premium

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**64%**	122
It's important to me that I visit somewhere that is open to diversity and inclusion	**62%**	138
I consider the impact that I personally have on the destinations I visit	**62%**	131
Hearing from underrepresented communities is an important part of travelling	**52%**	135
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**48%**	124

54%

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."

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We like exploring popular places and trendy but less-travelled and independent experiences.
- We like to engage with cultural attractions and explore history and heritage.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	62%	129
○ Museums	39%	143
○ Visiting local monuments	34%	129
○ Observing architecture	30%	128
Local cuisine	55%	108
○ Local restaurants	44%	99
○ Street cuisine	26%	140
Festivals and events	31%	129
○ Music concerts or festivals	23%	126
○ Cultural or traditional festivals	12%	134
Nightlife	20%	120
○ Bars and pubs	16%	122
○ Clubs and dancing	10%	114
High-intensity sports	6%	119
○ Mountain biking	4%	129
○ Rock climbing	3%	128
Nature experiences	42%	71
Shopping	29%	97
Guided tours	23%	104
Health and wellness	20%	61
Overnight experiences	19%	113
Casual sports	17%	94
Family-focussed attractions	15%	87

CULTURE SEEKERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	54%	74	64%	99
To learn through other cultures	41%	125	43%	107
To spend time with family	22%	82	31%	101
To be pampered	21%	79	16%	80
To escape from routine	25%	100	20%	97
For personal reflection and growth	27%	139	15%	96
To have fun with friends	8%	67	14%	91
For adventure and excitement	21%	98	27%	98
To check off dream travel places	17%	112	23%	109

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	36%	62	31%	71
Visiting friends / family	25%	125	42%	137
Family / friends wanted to go	24%	84	21%	101
Special event (e.g., wedding, reunion)	26%	141	12%	92
Festival or event	24%	128	36%	137
Kids wanted to go	15%	92	6%	90

24% 98 INDEX SCORE

Travel aligns with children's school schedule

25% 96 INDEX SCORE

Take time off for vacation during major holidays

15% 121 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 3 months of a trip, and using many information resources.

69%

Primary Trip Planner

131
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	**Started Researching and Planning – 3.6 months** ○ Travel provider websites
Started Researching and Planning – 3.2 months ○ Travel provider websites		
	3 MONTHS BEFORE MY TRIP	**Booked Transportation – 2.7 months** ○ Direct with company
Booked Transportation – 2.3 months ○ Travel booking sites/apps **Booked Accommodation – 2.3 months** ○ Travel booking sites/apps **Booked Activities – 1.5 months** ○ Travel booking sites/apps	**2 MONTHS** BEFORE MY TRIP	**Booked Accommodation – 2.3 months** ○ Travel booking sites/apps **Booked Activities – 1.8 months** ○ Travel booking sites/apps
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips enjoy energetic culture, historical sites, music, and nightlife.
- Some couples' trips are more like Refined Globetrotters.

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

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

% OF TOTAL TRIPS: 29% (125 INDEX SCORE)

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Small cities and town		16%
	Countryside and village		13%
TRIP EMOTIONAL MOTIVATIONS	Fun	Security	Novel & Authentic
ACTIVITIES	Local restaurants		43%
	Museums		27%
	Visiting local monuments		27%
KEY BEHAVIOURS	Seeking a friendly and safe small city to explore on our own		

% OF TOTAL TRIPS: 19% (161 INDEX SCORE)

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Urban Centre		
COMPANIONS	Alone		41%
	Couple only		29%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Escape & Relax
ACTIVITIES	Local restaurants		56%
	Museums		40%
	Cafés or bakeries		31%
KEY BEHAVIOURS	Bucket-list destination with famous attractions and bustling city vibe		

% OF TOTAL TRIPS: 9% (111 INDEX SCORE)

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		26%
	Non-family only		20%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Escape & Relax	Fun
ACTIVITIES	Local restaurants		66%
	Visiting local monuments		63%
	Museums		55%
KEY BEHAVIOURS	Authentic experience, immersed in a new culture. Planned well in advance		

% OF TOTAL TRIPS: 35% (137 INDEX SCORE)

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		24%
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Local restaurants		44%
	Oceanside beaches		25%
	Nature walks		14%
KEY BEHAVIOURS	Planned in advance, relaxing in a mild climate		

CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek rich culture and heritage, with a variety of museums and historical sites.
- We travel domestically visit other areas in Europe including Spain, France, Italy and Austria.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Germany	26%	89	Austria	5%	83
Italy	8%	111	US	4%	116
Spain	7%	78	UK	3%	134
France	7%	140	Portugal	3%	128
Greece	5%	114	Denmark	3%	97

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	38%	129
Is inclusive and tolerant	30%	148
Has a variety of museums and / or historical sites	27%	130
Provides a variety of local festivals and events	23%	145
Has a thriving arts and music scene	19%	150
Has many hidden gems	17%	117
Offers an energetic and dynamic cultural scene	17%	151
Has vibrant nightlife and entertainment	14%	136

CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

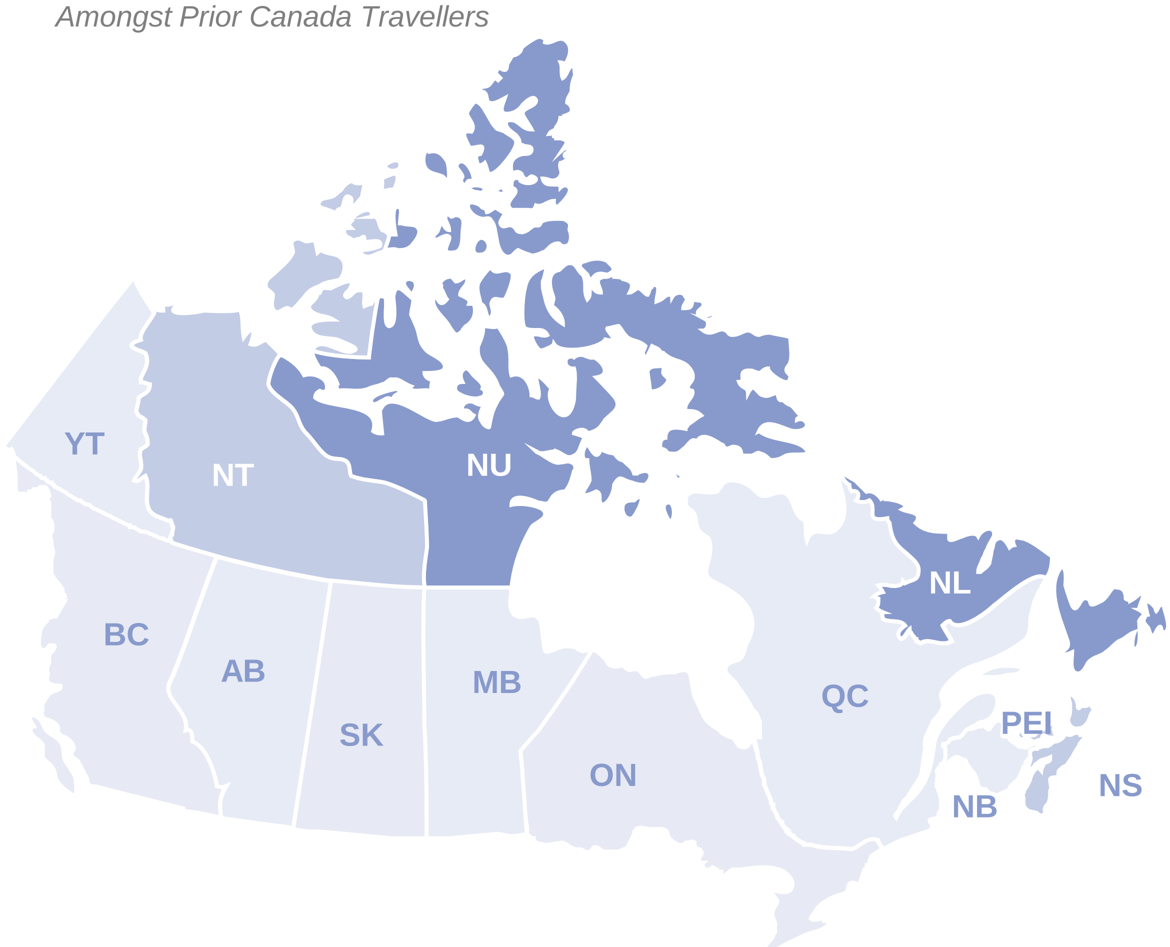
- Most of us have never visited Canada.
- Our visits have focussed on Ontario, Quebec and the Atlantic provinces.
- A future visit could include Quebec or Vancouver.

WHERE DO WE WANT TO GO IN CANADA

TORONTO OTTAWA QUEBEC
NEWFOUNDLAND ALBERTA NIAGARA FALLS
ONTARIO VANCOUVER NOVA SCOTIA
CALGARY
MONTREAL BRITISH COLUMBIA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	14%	83
BC	33%	89
MB	6%	103
NB	6%	94
NL	11%	125
NS	16%	120
NT	8%	117
NU	7%	129
ON	27%	59
PEI	6%	110
QC	24%	93
SK	4%	89
YT	2%	78

CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Most travel to Canada has been done during the spring, summer and fall months.
- Overall, our knowledge of Canada as a travel destination has an opportunity to grow.
- If we haven't been before, we are likely not considering a future trip.

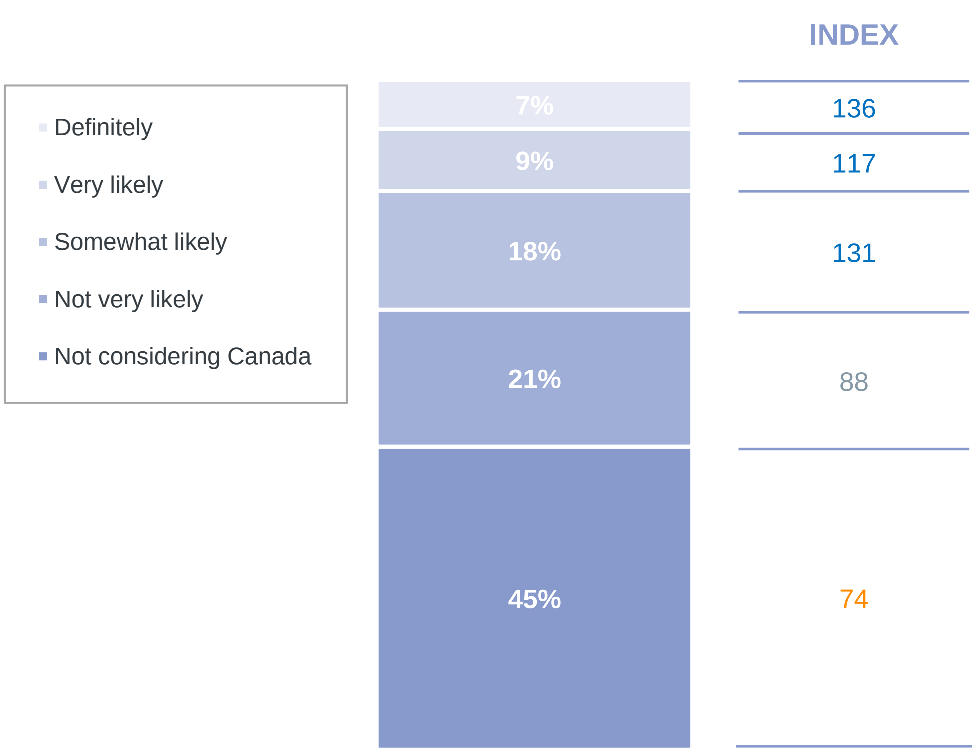
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CULTURE SEEKERS	**21%**	**34%**	**39%**	**21%**
VS. TOTAL MARKET	12%	30%	48%	26%

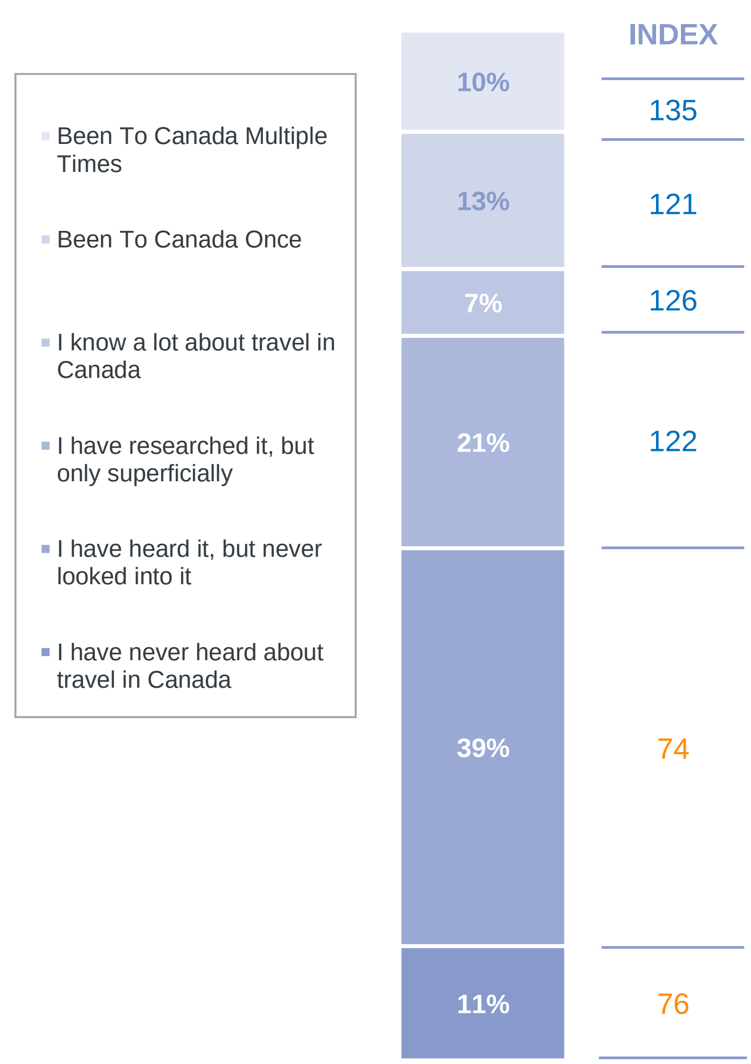
12% Been to Canada in last 5 years

133 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CULTURE SEEKERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- We primarily spend our money on leisure travel and experiences.
- In the last 5 years, we have purchased a new car, started a new job, invested in home renovations, or moved to a new city.

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%
Had a child
99 INDEX SCORE

26%
Started a new job / career
122 INDEX SCORE

5%
Bought a new home
111 INDEX SCORE

15%
Moved to a new city
111 INDEX SCORE

6%
Child started school
101 INDEX SCORE

37%
Purchased a car
93 INDEX SCORE

8%
Retired
83 INDEX SCORE

18%
Renovated house
111 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	60%	102
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	44%	106
Experiences (e.g., concerts, events).	37%	120
Savings and investments	35%	73
Home and decor	31%	107
Personal care and wellness	31%	80

REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY

11%

7.8M

% OF GERMANY POPULATION

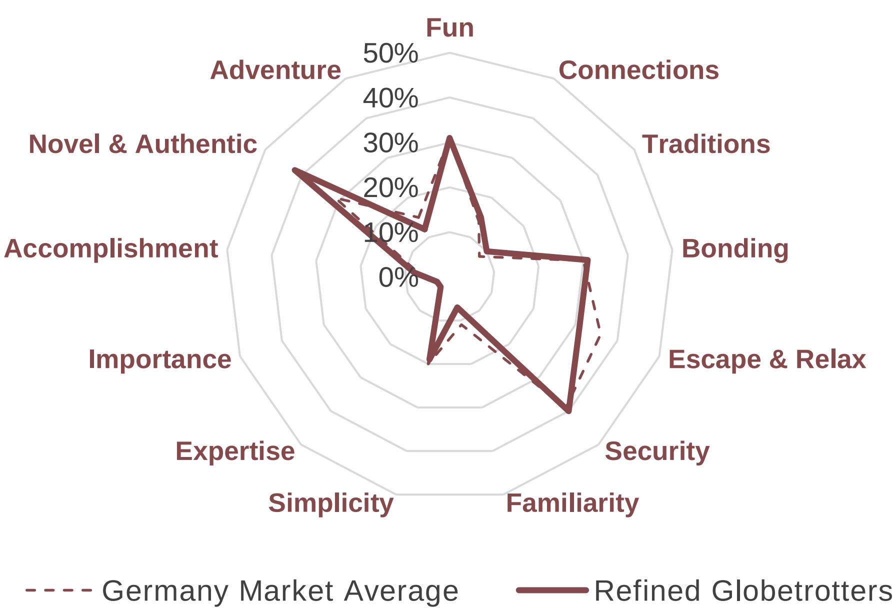
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross off our list.

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

WHAT YOU NEED TO KNOW ABOUT ME

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

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

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TRAVELLER ECONOMIC INDEX

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

REFINED GLOBETROTTERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm passionate about travelling	**92%**	135
I'm always on the look out for new destinations to visit next	**78%**	124
I tend to not think about my budget too much when travelling	**72%**	143
I prefer booking flights and accommodations well in advance	**70%**	142
I make sure to visit the “famous” sites wherever I go	**65%**	139
While I think about value for money, it doesn't tend to influence my choice of destination	**64%**	131
I prefer destinations with well-established tourist infrastructure	**54%**	125
Luxury experiences are an important part of travel	**52%**	151
I enjoy joining guided tours to explore new destinations	**47%**	143
When there's a lot of positive buzz about a destination it makes me want to visit it more	**40%**	126
I seek travel advice from travel agencies and agents	**40%**	145
I seek out fine dining experiences and gourmet cuisine when I travel	**31%**	129
When traveling, I expect 24 / 7 support from a travel provider	**29%**	136

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	**57%**	134
To have authentic experiences	**39%**	121
To open my mind to new perspectives	**30%**	127
To bond through shared experiences	**26%**	114
To be proud to share my travel experiences	**12%**	107
To feel like I've accomplished something	**11%**	125

DESIRED DESTINATION

	SCORE	INDEX
Authentic	**45%**	124
Unique	**30%**	120
Luxurious	**26%**	155
Charming	**22%**	123
Exclusive	**21%**	149
World-Class	**12%**	146

REFINED GLOBETROTTERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

AGE

	SCORE	INDEX
18-34	21%	88
35-54	31%	97
55+	48%	109
MEAN YEARS	51.8	113

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	10%	53
>$3K to $5K	70%	131
More than $5K	16%	147
Refused	4%	107

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	50%	108
Employed PT	8%	89
Self-employed	7%	133
Retired	27%	106

EDUCATION

	SCORE	INDEX
Primary education or less	12%	64
Secondary education	39%	62
Post-secondary education	49%	142

87%
134 Have a valid passport

GENDER

49% 95 Male

51% 105 Female

0% 87 Non-binary / Other

HOUSEHOLD

20% 96 Children <18 Living At Home*

10% 126 Children 18+ Living At Home*

33% 109 Children NOT Living At Home*

47% 101 No Children

** Option is not exclusive*

GERMANY STATE BREAKOUT

	SCORE	INDEX
Nordrhein-Westfalen	20%	83
Bayern	17%	102
Baden-Württemberg	15%	130
Hessen	7%	91
Berlin	6%	84
Niedersachsen	6%	67

	SCORE	INDEX
Sachsen-Anhalt	6%	114
Rheinland-Pfalz	5%	121
Schleswig-Holstein	5%	108
Brandenburg	3%	89
Hamburg	3%	96

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

144

TRAVEL TRADE INDEX: **GROUP**

118

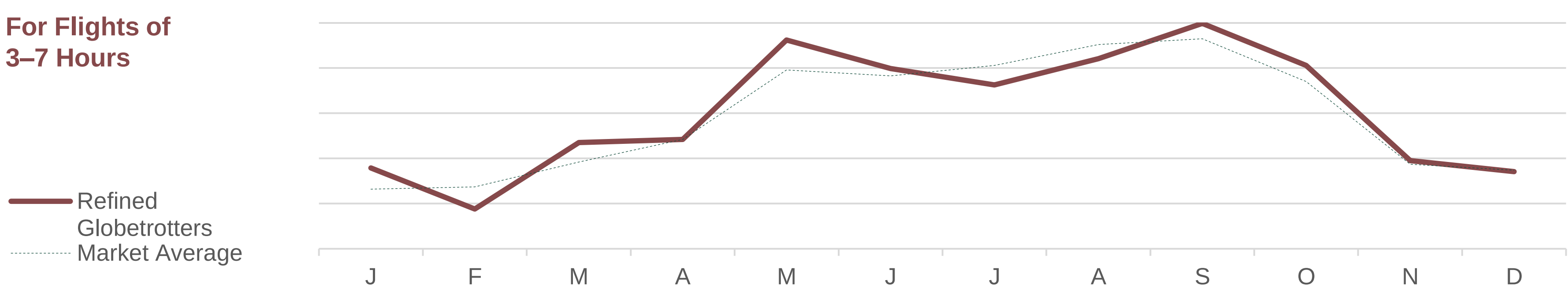
KEY terminology on this page

- **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.

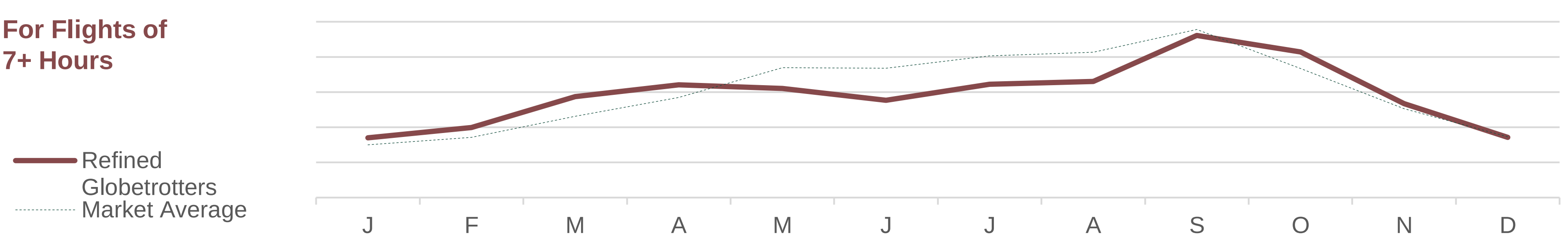
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	35%	106
3-5 Days	28%	132
1 Week Holiday	15%	105
2 Weeks Holiday	14%	120
3 Weeks Or More	6%	118

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	37%	125
International Leisure	32%	128
Business Trip	13%	117
Added Personal To Business	8%	126
Worked During Vacation	7%	109

Incidence is frequency of 2+ times per year

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Premium Hotel	40%	153
Mid-priced Hotel	39%	69
All-inclusive resort	27%	143
Vacation Rental (e.g., Airbnb, Vrbo)	20%	66
High-end / Luxury Hotel	14%	153
Cruise ship	13%	152

THOUGHTS ON INDIGENOUS TRAVEL

53%

102 INDEX SCORE

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

5%

93 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	80%	124
I really want to learn about the history of the destinations I visit	74%	121
I like to explore places that are off the beaten path and less explored	51%	92
I'm willing to put in the effort while travelling in order to see lesser-known places	49%	100
I'm open to travelling to destinations with limited tourist infrastructure	46%	75
I'm open to visiting destinations with challenging climates or weather conditions	36%	103

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	71%	120
Adult relatives	14%	89
Kids	13%	95
Solo	11%	87
Friends	10%	89

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,360

132
INDEX SCORE

SPEND STYLE

High-end luxury

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	56%	101
I consider the impact that I personally have on the destinations I visit	42%	91
It's important to me that I visit somewhere that is open to diversity and inclusion	38%	92
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	36%	96
Hearing from underrepresented communities is an important part of travelling	33%	99

43%

PRIORITIZE SUSTAINABLE TRAVEL

102 INDEX SCORE

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

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

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	62%	127
○ Local restaurants	51%	121
○ Luxury dining	19%	153
○ Wineries	18%	137
Cultural experiences or attractions	60%	124
○ Historical or archeological sites	42%	143
○ Visiting local monuments	35%	134
Health and wellness	38%	139
○ Sauna or steam bath	21%	140
○ Outdoor hot tub or bath	20%	121
Guided tours	33%	136
○ City tours	26%	136
○ Wildlife or nature tours	15%	127
Overnight experiences	26%	144
○ Cruise	11%	144
○ Staying at all-inclusive resort	8%	125
Nature experiences	55%	98
Shopping	33%	107
Family-focussed attractions	20%	93
Casual sports	13%	77
Festivals and events	14%	85
Winter-based sports	10%	101
Water-based sports	10%	93

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	70%	106	69%	110
To learn through other cultures	28%	94	42%	104
To be pampered	43%	123	33%	109
To spend time with family	35%	101	29%	98
To escape from routine	17%	82	21%	99
To check off dream travel places	14%	97	25%	116
To have fun with friends	18%	99	15%	93
For a romantic getaway	20%	129	16%	119
For adventure and excitement	15%	82	18%	80

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	54%	105	53%	117
Family / friends wanted to go	22%	81	14%	90
Visiting friends / family	24%	124	25%	91
Special event (e.g., wedding, reunion)	20%	116	15%	105
Kids wanted to go	17%	95	12%	99
Festival or event	16%	101	12%	87

21% 96 INDEX SCORE

Travel aligns with children's school schedule

25% 98 INDEX SCORE

Take time off for vacation during major holidays

14% 111 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 4 months in advance, even for shorter distance trips.

59%

Primary Trip Planner

107
INDEX SCORE

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

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

FLIGHT OF 3–7 HOURS		FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 6 Months** ○ Travel booking sites/apps ○ Travel provider websites
	5 MONTHS BEFORE MY TRIP	**Booked Transportation – 5.1 months** ○ Travel booking sites/apps **Booked Accommodation – 4.7 months** ○ Travel booking sites/apps
Started Researching and Planning – 3.8 months ○ Travel guidebooks ○ Official tourism websites	**4 MONTHS** BEFORE MY TRIP	
Booked Accommodation – 3.1 months ○ Travel booking sites/apps **Booked Transportation – 3.1 months** ○ Travel booking sites/apps	**3 MONTHS** BEFORE MY TRIP	**Booked Activities – 3.5 months** ○ Travel booking sites/apps
	2 MONTHS BEFORE MY TRIP	
Booked Activities – 1.9 months ○ Travel booking sites/apps	**1 MONTH** BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

DESTINATION CANADA

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips explore beaches and city centres, as well as more exclusive and luxury destinations.
- 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

54% 150 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort	24%	
	Urban centre	13%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Local restaurants	44%	
	Oceanside beaches	25%	
	Visiting local monuments	24%	
KEY BEHAVIOURS	Trip to a warm climate. Seeking established tourism destination for premium experience		

% OF TOTAL TRIPS

7% 103 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Luxury Resort		
COMPANIONS	Couple only	60%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Security
ACTIVITIES	Local restaurants	31%	
	Luxury dining	28%	
	Spas	26%	
KEY BEHAVIOURS	Seeking unique and exclusive destinations where we can be pampered		

% OF TOTAL TRIPS

2% 80 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	54%	
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Bonding
ACTIVITIES	Historical or archeological sites	45%	
	Religious buildings or sites	43%	
	Visiting local monuments	41%	
KEY BEHAVIOURS	Mid-range budget, seeing famous attractions and experiencing new cultures, may be a cruise		

% OF TOTAL TRIPS

22% 164 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only	56%	
	Extended family	21%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants	62%	
	Oceanside beaches	39%	
	Nature walks	25%	
KEY BEHAVIOURS	Reliable vacation with extended family. Affordable, likely a repeat destination		

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We enjoy exploring the outdoors, with access to nature, through curated experiences.
- We travel everywhere, close to home in Europe, but overindex for most long-haul destinations.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Germany	20%	74	Austria	5%	94
Spain	9%	103	US	4%	118
Italy	8%	105	Thailand	3%	135
France	6%	125	Netherlands	3%	83
Greece	6%	139	Portugal	3%	119

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has famous attractions	44%	137
Has a rich cultural and historical heritage	40%	133
Known for stunning natural landscapes	37%	117
Renowned for food and drink experiences	32%	142
Offers all-inclusive resort packages	28%	142
Has a variety of museums and / or historical sites	28%	132
Has luxury dining, shopping, and accommodations	24%	154
Has packaged holiday / vacation offers	19%	129

REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

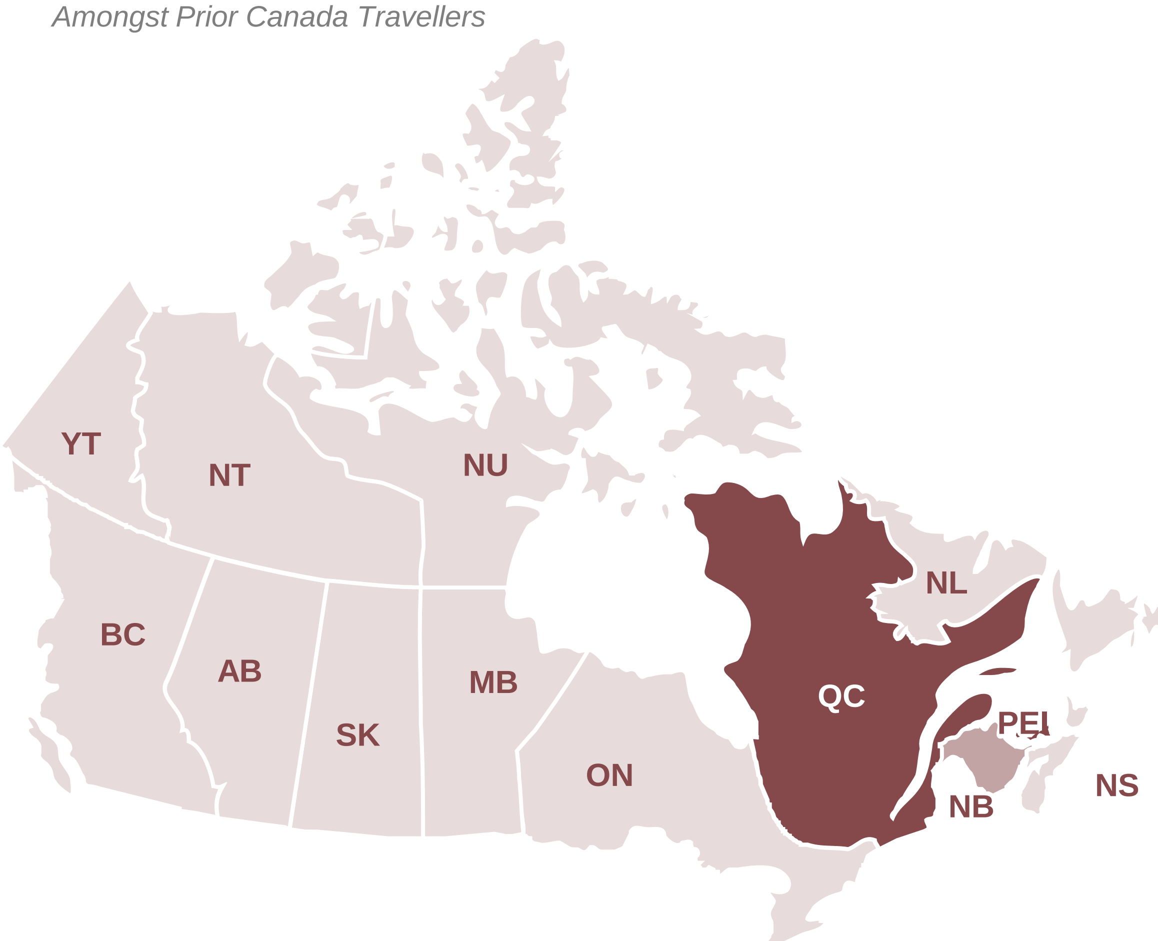
- We may have been to Canada before, but perhaps not recently.
- We are most likely to have visited British Columbia, Ontario and Quebec.
- A future trip to Canada could include Montreal or Vancouver.

WHERE DO WE WANT TO GO IN CANADA

QUEBEC EAST COAST VANCOUVER
NIAGARA FALLS PRINCE EDWARD ISLAND
CN TOWER MONTREAL ONTARIO
WEST COAST CALGARY NATIONAL PARK
OTTAWA BANFF TORONTO

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	20%	98
BC	38%	111
MB	5%	95
NB	14%	117
NL	5%	93
NS	10%	96
NT	4%	87
NU	2%	85
ON	44%	107
PEI	8%	130
QC	35%	125
SK	7%	104
YT	5%	97

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

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

CANADA TRAVEL MONTHS ON A PAST TRIP

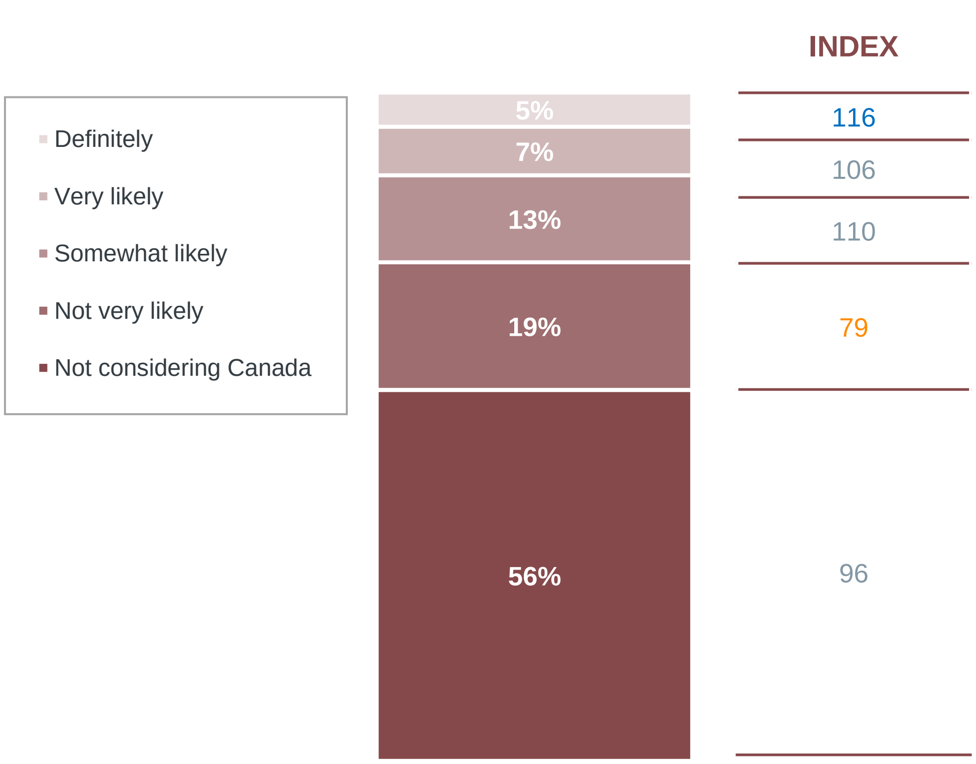
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	**9%**	**29%**	**50%**	**32%**
VS. TOTAL MARKET	12%	30%	48%	26%

8%

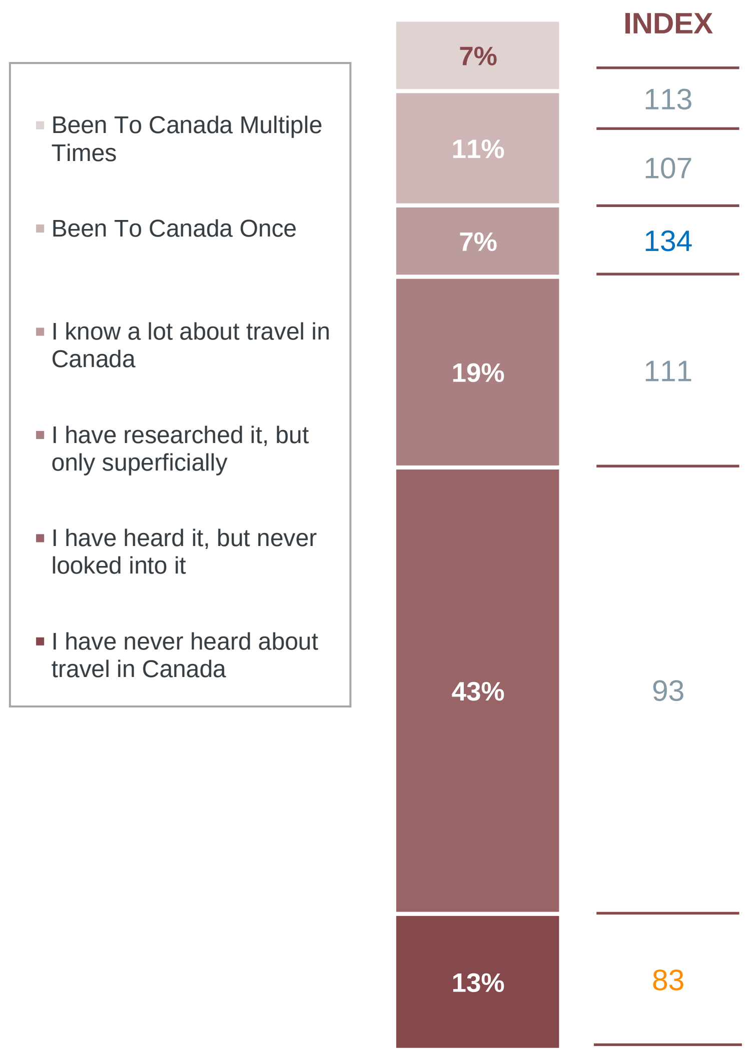
Been to Canada in last 5 years

104 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Our higher net-worth affords us the ability to continue to invest in new, big purchases (like home renovations or vehicles), and of course travel.
- After spending on travel, our next biggest priority is continuing to grow our savings.

MAJOR LIFE EVENTS IN LAST 5 YEARS

2%
Had a child
92 INDEX SCORE

17%
Started a new job / career
72 INDEX SCORE

3%
Bought a new home
91 INDEX SCORE

13%
Moved to a new city
86 INDEX SCORE

4%
Child started school
96 INDEX SCORE

46%
Purchased a car
134 INDEX SCORE

12%
Retired
106 INDEX SCORE

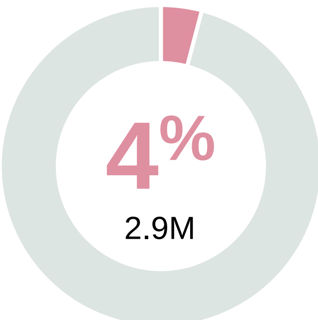
20%
Renovated house
129 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	74%	144
Savings and investments	42%	120
Fashion and accessories	35%	122
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	33%	55
Experiences (e.g., concerts, events)	32%	95
Personal care and wellness	30%	78

PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF GERMANY POPULATION

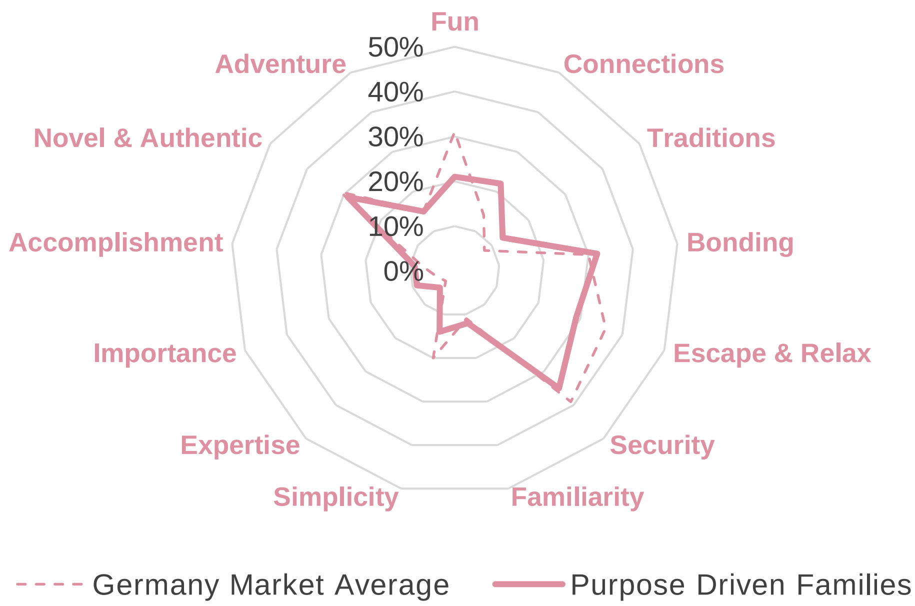
We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish trendy destinations, hidden gems that support local cultures, and anywhere that lets us spend time in nature.

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

WHAT YOU NEED TO KNOW ABOUT ME

1. We are social, and like to visit destinations filled with both locals and other travellers we can connect with.
2. Being trendy includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.
3. We value being able to provide these experiences to our children, but we also appreciate how it demonstrates our success to others.
4. Staying active and facing challenges in the outdoors provides an important sense of accomplishment.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

130

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

115

How is this calculated?

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

PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We value learning, engaging with local cultures, and connecting with new people while travelling.
- We use travel to experience something new, and view this as an accomplishment.
- We are passionate about travel, and seek world-class destinations that will make our friends say 'wow'.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I am more likely to select destinations / activities that invest in socially responsible tourism	75%	145
I generally think natural attractions are the highlights of my trip	60%	116
I learn the basics of a language before visiting a country / region	54%	113
I'm a planner, while travelling I like to know what comes next	50%	116
I feel best on vacation when being highly active	46%	123
I love posting my trips on social media to share with friends	44%	133
I seek out destinations where I can explore my ancestral heritage	41%	131
When there's a lot of positive buzz about a destination it makes me want to visit it more	40%	127
Even while travelling, I like to maintain regular contact with my duties or obligations back home	34%	136
I'd be open to using AI-powered chatbots for travel planning and assistance	34%	120
I seek travel advice from travel agencies and agents	33%	125
Luxury experiences are an important part of travel	33%	117
I seek out fine dining experiences and gourmet cuisine when I travel	32%	133

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	43%	116
To feel connected with new people	22%	124
To create new, or take part in old, traditions	13%	126
To feel like I've accomplished something	10%	121
To feel like I'm important	9%	130
To feel like a travel expert	5%	123

DESIRED DESTINATION

	SCORE	INDEX
Sociable	29%	140
Accepting	28%	119
Caring	19%	134
Passionate	15%	114
Exclusive	14%	121
World-Class	9%	122

PURPOSE DRIVEN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

73%
103 Have a valid passport

GENDER

48% 91 Male

52% 110 Female

0% 87 Non-binary / Other

AGE

	SCORE	INDEX
18-34	**36%**	128
35-54	**44%**	125
55+	**20%**	65
MEAN YEARS	**42.6**	67

HH INCOME (CAD)*

	SCORE	INDEX
$3K or less	**17%**	85
>$3K to $5K	**69%**	122
More than $5K	**11%**	115
Refused	**3%**	74

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	**57%**	127
Employed PT	**16%**	118
Self-employed	**4%**	86
Retired	**13%**	70

EDUCATION

	SCORE	INDEX
Primary education or less	**16%**	115
Secondary education	**47%**	90
Post-secondary education	**38%**	106

HOUSEHOLD

72% 142 Children <18 Living At Home*

7% 91 Children 18+ Living At Home*

12% 60 Children NOT Living At Home*

16% 62 No Children

** Option is not exclusive*

GERMANY STATE BREAKOUT

	SCORE	INDEX
Nordrhein-Westfalen	**17%**	52
Bayern	**15%**	88
Baden-Württemberg	**13%**	104
Hessen	**11%**	136
Niedersachsen	**9%**	112
Berlin	**9%**	114

	SCORE	INDEX
Sachsen-Anhalt	**8%**	128
Brandenburg	**3%**	89
Schleswig-Holstein	**3%**	89
Mecklenburg-Vorpommern	**3%**	118
Rheinland-Pfalz	**3%**	86

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

118

TRAVEL TRADE INDEX: **GROUP**

137

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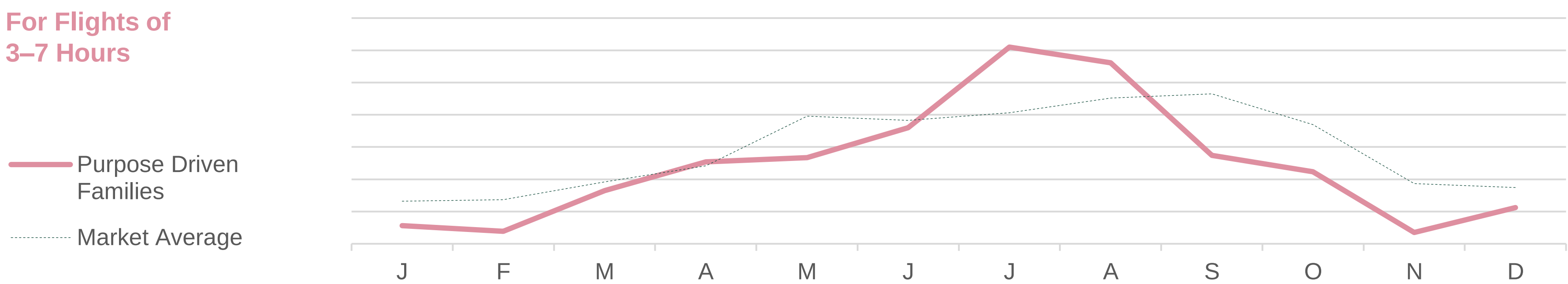
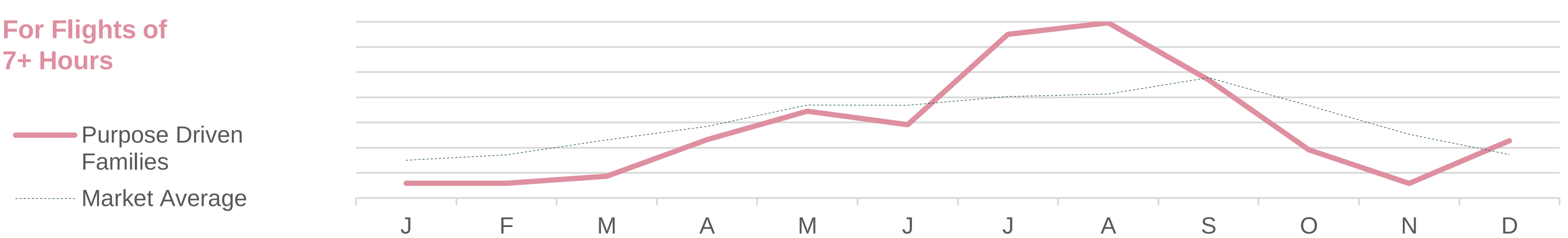
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	34%	101
3-5 Days	15%	79
1 Week Holiday	15%	107
2 Weeks Holiday	7%	90
3 Weeks Or More	3%	83

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	28%	60
International Leisure	20%	95
Business Trip	9%	99
Added Personal To Business	4%	89
Worked During Vacation	5%	95

Incidence is frequency of 2+ times per year

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**41%**	74
Vacation Rental (e.g., Airbnb, Vrbo)	**33%**	111
Premium Hotel	**19%**	102
All-inclusive resort	**16%**	97
Friend's or family's place	**14%**	110
Budget Hotel	**12%**	95

THOUGHTS ON INDIGENOUS TRAVEL

63%

121 INDEX SCORE

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

12%

134 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	**76%**	125
You only ever get to know a country by experiencing its culture	**73%**	102
I'm open to travelling to destinations with limited tourist infrastructure	**62%**	107
I like to explore places that are off the beaten path and less explored	**59%**	105
I'm willing to put in the effort while travelling in order to see lesser-known places	**55%**	110
I'm open to visiting destinations with challenging climates or weather conditions	**38%**	108

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We attended post-secondary education, are working full-time, and earn comfortable to high incomes.
- Our budgets are generous, as we seek premium experiences.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**74%**	127
Kids	**64%**	140
Adult relatives	**14%**	94
Solo	**8%**	76
Friends	**6%**	73

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,000

122
INDEX SCORE

SPEND STYLE

Premium / Upscale

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
I consider the impact that I personally have on the destinations I visit	**66%**	139
It's important for me to know that the money I spend will support the local economy I'm visiting	**60%**	110
It's important to me that I visit somewhere that is open to diversity and inclusion	**59%**	132
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**53%**	134
Hearing from underrepresented communities is an important part of travelling	**46%**	124

63%

PRIORITIZE SUSTAINABLE TRAVEL

140 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

- Cultural experiences, festivals, and events are a highlight.
- Guided tours are a great way to ensure we stay busy and get the most of our trip.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focussed attractions	**59%**	132
○ Zoos or aquariums	**44%**	129
○ Amusement parks or theme parks	**44%**	129
○ Space or science centres	**10%**	148
Nature experiences	**53%**	95
○ Nature walks	**27%**	91
○ Visiting nature parks or preserves	**24%**	112
Cultural experiences or attractions	**51%**	101
○ Historical or archeological sites	**31%**	103
○ Indigenous experiences	**12%**	134
Local cuisine	**48%**	91
○ Local restaurants	**39%**	85
○ Street cuisine	**18%**	101
Water-based sports	**14%**	110
○ Scuba diving or snorkeling	**6%**	120
○ White-water rafting	**3%**	131
Health and wellness	**25%**	83
Shopping	**22%**	82
Guided tours	**21%**	94
Casual sports	**16%**	89
Overnight experiences	**16%**	100
Festivals and events	**13%**	85
Winter-based sports	**10%**	100

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	61%	137	61%	137
To relax and unwind	62%	90	70%	113
To have fun with friends	34%	150	29%	127
To escape from routine	32%	116	23%	102
To learn through other cultures	27%	93	43%	110
To be pampered	15%	67	3%	58
For adventure and excitement	26%	112	12%	70
For personal reflection and growth	8%	80	2%	60
To check off dream travel places	8%	65	10%	69

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	59%	119	57%	126
Kids wanted to go	60%	144	39%	141
Family / friends wanted to go	47%	137	40%	138
Visiting friends / family	17%	55	35%	118
Special event (e.g., wedding, reunion)	10%	71	16%	108
Festival or event	8%	71	5%	73

61% 140 INDEX SCORE

Travel aligns with children's school schedule

52% 139 INDEX SCORE

Take time off for vacation during major holidays

16% 130 INDEX SCORE

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

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

55%

Primary Trip Planner

99

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	TIMELINE	FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 5.8 months** - Recommendations from friends or family - Travel review sites
	5 MONTHS BEFORE MY TRIP	**Booked Transportation – 4.7 months** - Travel booking sites/apps **Booked Accommodation – 4.2 months** - Travel booking sites/apps
Started Researching and Planning – 3.3 months - Travel agents **Booked Accommodation – 3.2 months** - Travel booking sites/apps **Booked Transportation – 2.9 months** - Travel booking sites/apps	**4 MONTHS** BEFORE MY TRIP	
	3 MONTHS BEFORE MY TRIP	**Booked Activities – 2.9 months** - Travel booking sites/apps
Booked Activities – 1.8 months - Travel booking sites/apps	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips explore beaches or new places, exposing our kids to upscale experiences.
- We also take trips like Culture Seekers 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: **22%** 163 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		**55%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Oceanside beaches		**33%**
	Amusement parks or theme parks		**27%**
	Zoos or aquariums		**18%**
KEY BEHAVIOURS	Planned in advance, likely all-inclusive, focussed on kid-friendly fun, higher budget		

% OF TOTAL TRIPS: **13%** 128 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ● ●

TRIP TYPE	Cultural Experience		
COMPANIONS	Nuclear family with kids		**50%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Escape & Relax	Security
ACTIVITIES	Historical or archeological sites		**38%**
	Cafés or bakeries		**29%**
	Visiting local monuments		**28%**
KEY BEHAVIOURS	A new culture that is safe to explore with our kids. Staying in a vacation rental		

% OF TOTAL TRIPS: **14%** 131 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only		**29%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Escape & Relax
ACTIVITIES	Local restaurants		**56%**
	Museums		**40%**
	Street cuisine		**30%**
KEY BEHAVIOURS	Quick city trip with our partner. Affordable, planned more last minute		

% OF TOTAL TRIPS: **19%** 103 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ○ ○ ○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		**24%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Security
ACTIVITIES	Local restaurants		**44%**
	Oceanside beaches		**25%**
	Historical or archeological sites		**24%**
KEY BEHAVIOURS	Trip to disconnect and relax. Must be easy to travel to and be developed destination		

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We are looking for trendy kid-friendly access to nature and new cultural experiences.
- Most of our travel is within Europe, but we annually venture further to Asian countries and the Americas.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Germany	25%	87	France	5%	96
Italy	11%	139	Denmark	3%	115
Spain	8%	84	US	3%	102
Austria	7%	123	Croatia	3%	106
Greece	5%	114	UK	3%	123

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	80%	143
Has a rich cultural and historical heritage	30%	112
Provides numerous opportunities for outdoor adventures	19%	111
Is inclusive and tolerant	18%	109
Has packaged holiday / vacation offers	17%	119
Is a trendy destination	12%	127
Has vibrant nightlife and entertainment	7%	107
Offers options for adrenaline seekers	6%	123

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

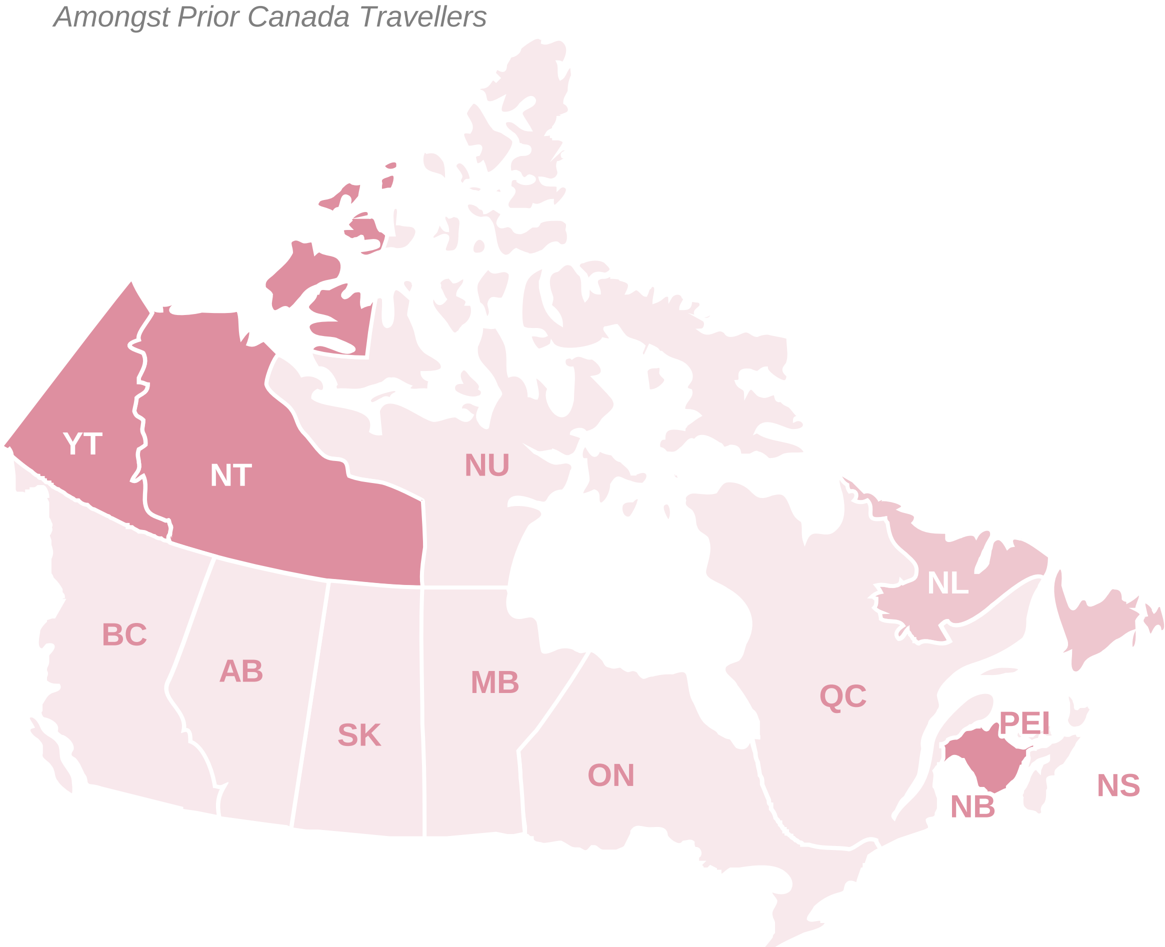
- We likely have not been to Canada before.
- Toronto and Vancouver are big cities on our list for future trips if decide to visit.

WHERE DO WE WANT TO GO IN CANADA

NIAGARA
VANCOUVER
TORONTO
CALGARY
BANFF
MONTREAL
OTTAWA
ONTARIO

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	15%	84
BC	33%	89
MB	0%	67
NB	23%	145
NL	10%	117
NS	9%	93
NT	9%	129
NU	5%	105
ON	44%	108
PEI	4%	97
QC	20%	79
SK	4%	88
YT	10%	130

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- For those of us who have visited Canada, is has been summer and fall months.
- If we haven't been yet, we would be open to considering it for the future.
- In general, we don't know a lot about Canada as a travel destination.

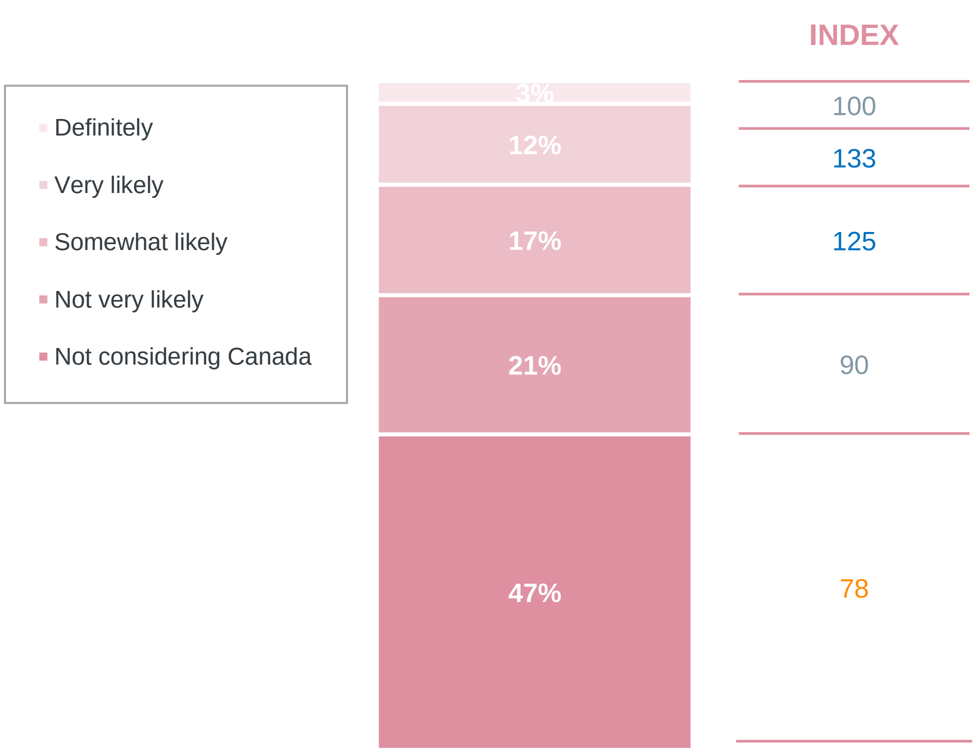
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	**8%**	**24%**	**57%**	**34%**
VS. TOTAL MARKET	12%	30%	48%	26%

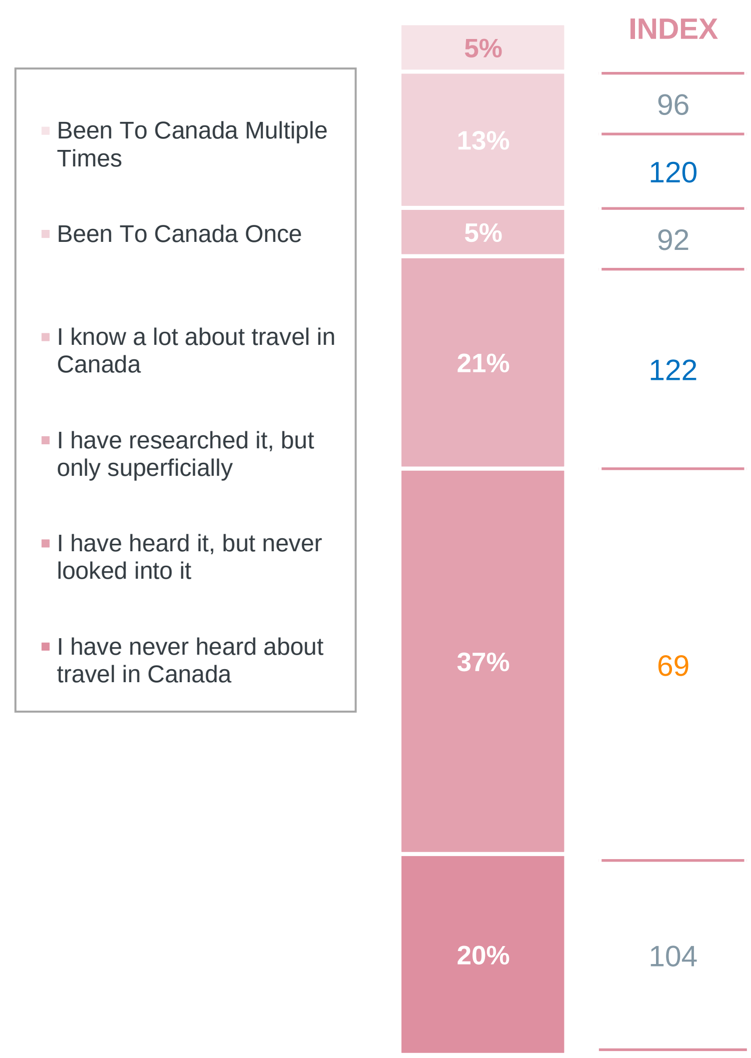
10% Been to Canada in last 5 years

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 focussed on our growing and changing family, whether that means welcoming a new family member, or seeing our kids start school for the first time.

MAJOR LIFE EVENTS IN LAST 5 YEARS

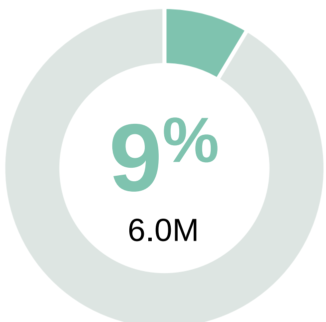
24% Had a child — 134 INDEX SCORE	**28%** Started a new job / career — 132 INDEX SCORE	**8%** Bought a new home — 144 INDEX SCORE	**14%** Moved to a new city — 101 INDEX SCORE
22% Child started school — 147 INDEX SCORE	**43%** Purchased a car — 122 INDEX SCORE	**6%** Retired — 70 INDEX SCORE	**20%** Renovated house — 125 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	57%	96
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	49%	129
Home and decor	36%	123
Savings and investments	35%	77
Fashion and accessories	31%	96
Personal care and wellness	28%	66

CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



% OF GERMANY POPULATION

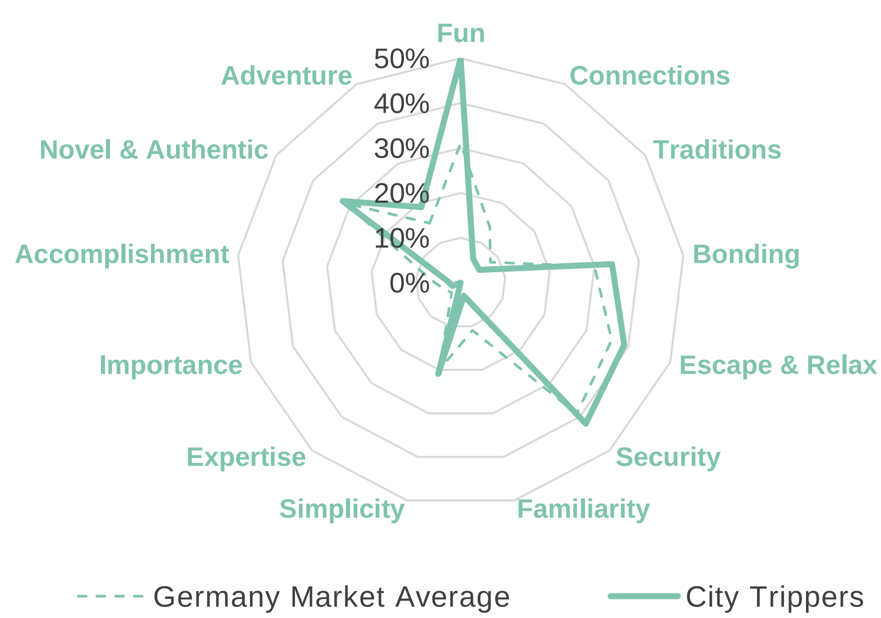
We are independent, sociable, and trendy travellers who prioritize having fun, indulging, and living in the moment. We prefer trendy, friendly locations with a variety of activities and distractions, valuing safety and ease of travel.

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

WHAT YOU NEED TO KNOW ABOUT ME

1	We prioritize fun and social settings and seek experiences that are worth sharing on social media.
2	We like to let loose, find adventure, and forget about the day to day. If a destination garners a lot of positive buzz, it heightens our desire to visit.
3	We value simplicity in our travels, preferring destinations that are easy to maneuver and travel around in. If we can save some money even better.
4	We plan a little in advance, and will use travel agents to help us secure the popular and must-have parts of our trips.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

81

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

81

How is this calculated?

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

CITY TRIPPERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	**79%**	150
I generally only choose destinations with comfortable climate and weather conditions	**78%**	131
I prefer traditional and well-known accommodation options when travelling	**73%**	124
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	**73%**	122
While travelling, I generally stick to places that are direct and convenient to get to	**70%**	129
I generally don't think much on the impact that I personally have on the destinations I visit	**67%**	127
I generally stick to the most popular areas when I visit somewhere	**64%**	133
I like natural attractions but I don't usually think they are the highlights of my trip	**62%**	134
I prefer destinations with well-established tourist infrastructure	**58%**	133
I will generally not go out of my way to buy local when travelling	**56%**	132
Videos and pictures on social media inspire me to travel	**54%**	139
I love posting my trips on social media to share with friends	**42%**	128
When there's a lot of positive buzz about a destination it makes me want to visit it more	**39%**	124

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	**70%**	141
To indulge myself and live in the moment	**60%**	139
To let loose and forget about day-to-day life	**58%**	117
To feel a sense of adventure	**22%**	108
To have a fun, social setting	**20%**	150
To be proud to share my travel experiences	**16%**	130

DESIRED DESTINATION

	SCORE	INDEX
Friendly	**72%**	128
Fun	**67%**	156
Carefree	**40%**	130
Open	**36%**	129
Charming	**23%**	125
Trendy	**8%**	133

CITY TRIPPERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

68%
92 Have a valid passport

AGE

	SCORE	INDEX
18-34	**33%**	118
35-54	**31%**	99
55+	**36%**	90
MEAN YEARS	**47.0**	89

HH INCOME (CAD)*

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

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	**42%**	87
Employed PT	**11%**	102
Self-employed	**3%**	73
Retired	**25%**	101

EDUCATION

	SCORE	INDEX
Primary education or less	**18%**	146
Secondary education	**55%**	119
Post-secondary education	**28%**	72

GENDER

48% 93 Male

52% 107 Female

0% 87 Non-binary / Other

HOUSEHOLD

17% 93 Children <18 Living At Home*

7% 92 Children 18+ Living At Home*

30% 103 Children NOT Living At Home*

53% 108 No Children

** Option is not exclusive*

GERMANY STATE BREAKOUT

	SCORE	INDEX
Nordrhein-Westfalen	**21%**	91
Bayern	**17%**	101
Baden-Württemberg	**12%**	78
Hessen	**10%**	124
Niedersachsen	**10%**	119
Schleswig-Holstein	**6%**	126

	SCORE	INDEX
Rheinland-Pfalz	**6%**	130
Sachsen-Anhalt	**5%**	107
Berlin	**5%**	63
Brandenburg	**3%**	86
Hamburg	**2%**	69

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

112

TRAVEL TRADE INDEX: **GROUP**

103

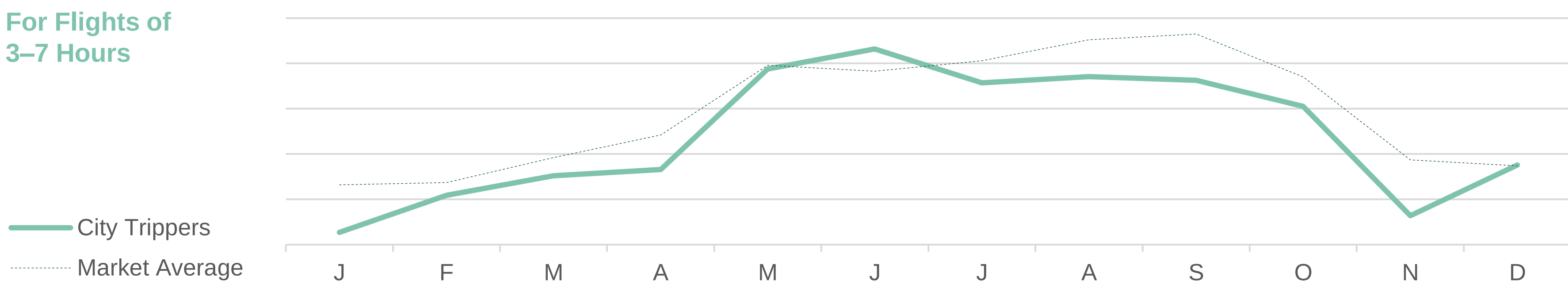
KEY terminology on this page

- **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

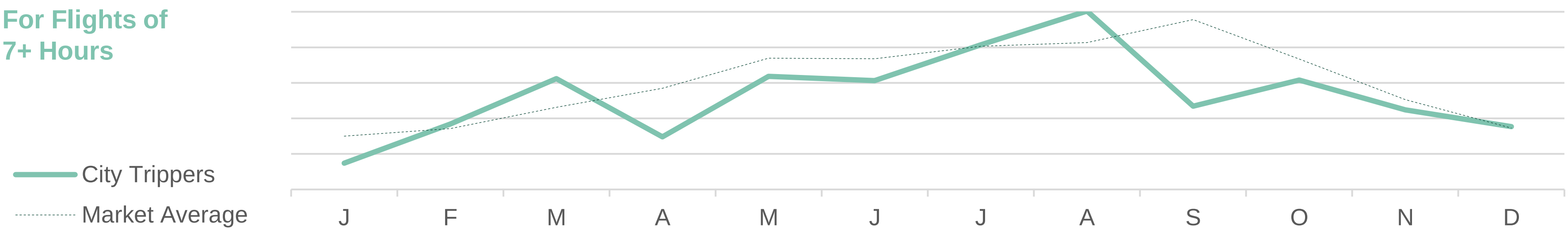
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	35%	106
3-5 Days	15%	82
1 Week Holiday	8%	70
2 Weeks Holiday	5%	83
3 Weeks Or More	1%	64

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	37%	130
International Leisure	18%	89
Business Trip	5%	78
Added Personal To Business	2%	73
Worked During Vacation	1%	71

Incidence is frequency of 2+ times per year

CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	57%	140
Vacation Rental (e.g., Airbnb, Vrbo)	28%	93
Budget Hotel	21%	138
All-inclusive resort	18%	106
Premium Hotel	13%	86
Friend's or family's place	12%	93

THOUGHTS ON INDIGENOUS TRAVEL

42%

84 INDEX SCORE

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

4%

82 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	71%	95
I really want to learn about the history of the destinations I visit	50%	78
I'm open to travelling to destinations with limited tourist infrastructure	42%	67
I like to explore places that are off the beaten path and less explored	36%	67
I'm willing to put in the effort while travelling in order to see lesser-known places	30%	71
I'm open to visiting destinations with challenging climates or weather conditions	23%	69

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel as a couple as well as with our friends. We don't often travel with kids, even if they are adults.
- Our budget is mid-range. We don't often splurge.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**58%**	86
Friends	**23%**	144
Adult relatives	**17%**	122
Solo	**13%**	93
Kids	**10%**	93

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,190

71
INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**44%**	68
It's important to me that I visit somewhere that is open to diversity and inclusion	**37%**	90
I consider the impact that I personally have on the destinations I visit	**33%**	73
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**27%**	78
Hearing from underrepresented communities is an important part of travelling	**22%**	79

32%

PRIORITIZE SUSTAINABLE TRAVEL

81 INDEX SCORE

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

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

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**57%**	114
○ Local restaurants	**52%**	122
○ Street cuisine	**24%**	130
○ Breweries	**13%**	139
Shopping	**50%**	149
○ Visiting famous shopping centres or areas	**34%**	155
○ Souvenir shopping	**24%**	149
Festivals and events	**36%**	140
○ Music concerts or festivals	**29%**	144
○ Cultural or traditional festivals	**13%**	137
Family-focussed attractions	**37%**	110
○ Amusement parks or theme parks	**28%**	111
○ Zoos or aquariums	**27%**	109
Nightlife	**28%**	145
○ Bars and pubs	**23%**	146
○ Clubs and dancing	**18%**	149
Cultural experiences or attractions	**55%**	113
Nature experiences	**39%**	64
Health and wellness	**30%**	106
Guided tours	**25%**	107
Overnight experiences	**12%**	81
Casual sports	**12%**	71
Water-based sports	**7%**	77

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	**75%**	118	**62%**	97
To escape from routine	**26%**	101	**17%**	90
To spend time with family	**38%**	105	**27%**	96
To have fun with friends	**23%**	114	**36%**	145
To be pampered	**33%**	103	**41%**	123
For adventure and excitement	**26%**	110	**35%**	114
To learn through other cultures	**25%**	87	**34%**	77
To check off dream travel places	**18%**	115	**24%**	112
For a romantic getaway	**19%**	126	**7%**	74

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	**58%**	115	**40%**	89
Visiting friends / family	**21%**	94	**17%**	67
Family / friends wanted to go	**28%**	93	**18%**	97
Festival or event	**18%**	107	**28%**	121
Special event (e.g., wedding, reunion)	**12%**	81	**11%**	88
Kids wanted to go	**12%**	89	**7%**	90

21% 95 INDEX SCORE

Travel aligns with children's school schedule

26% 98 INDEX SCORE

Take time off for vacation during major holidays

11% 91 INDEX SCORE

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

CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We do some planning, thinking about trips a few months in advance. We'll secure transportation and accommodation, but leave activities until later.

52%

Primary Trip Planner

91
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	Timeline	FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
Started Researching and Planning – 3.6 months ○ Travel booking sites/apps **Booked Accommodation – 3.2 months** ○ Travel booking sites/apps **Booked Transportation – 3.1 months** ○ Through a travel agent	**5 MONTHS** BEFORE MY TRIP	**Started Researching and Planning – 4.6 Months** ○ Travel booking sites/apps
	4 MONTHS BEFORE MY TRIP	**Booked Transportation – 3.6 months** ○ Travel booking sites/apps **Booked Accommodation – 3.3 months** ○ Travel booking sites/apps
Booked Activities – 2.5 months ○ Travel booking sites/apps	**3 MONTHS** BEFORE MY TRIP	
	2 MONTHS BEFORE MY TRIP	**Booked Activities – 2.4 months** ○ Travel booking sites/apps
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Most of our trips are to cities or beach destinations.
- \We also take trips like Simplicity Lovers 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: 25% — 161 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Urban Centre		
COMPANIONS	Non-family only	**33%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Security
ACTIVITIES	Visiting famous shopping centres	**31%**	
	Bars and pubs	**31%**	
	Street cuisine	**15%**	
KEY BEHAVIOURS	A couples trip with friends to visit a trendy city where friends live		

% OF TOTAL TRIPS: 21% — 149 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only	**43%**	
	Extended family	**19%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants	**52%**	
	Souvenir shopping	**30%**	
	Oceanside beaches	**26%**	
KEY BEHAVIOURS	All-inclusive destination planned in advance. May include extended family		

% OF TOTAL TRIPS: 11% — 116 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○ (3 of 5)

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only	**67%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants	**62%**	
	Cafés or bakeries	**37%**	
	Nature walks	**29%**	
KEY BEHAVIOURS	Higher budget, famous attractions and experiencing new cultures, may be a cruise		

% OF TOTAL TRIPS: 7% — 102 INDEX SCORE

SEGMENT ALIGNMENT: ●●○○○ (2 of 5)

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	**54%**	
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Bonding
ACTIVITIES	Historical or archeological sites	**46%**	
	Local restaurants	**43%**	
	Religious buildings or sites	**43%**	
KEY BEHAVIOURS	Seeking affordable relaxation without crowds, staying in a vacation rental		

CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek trendy locations with ease of travel, where festivals, famous attractions, and nightlife are abundant.
- We travel within Germany but also love to travel across Europe. We have also travelled to Egypt, Morocco and Turkey.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Germany	**30%**	101	France	**4%**	79
Spain	**12%**	142	Austria	**3%**	55
Italy	**8%**	99	Netherlands	**3%**	103
Greece	**4%**	89	Egypt	**3%**	152
Croatia	**4%**	121	Poland	**3%**	121

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	**61%**	122
Has famous attractions	**43%**	133
Is easy to travel to	**40%**	115
Renowned for food and drink experiences	**23%**	116
Has well-developed tourism infrastructure	**22%**	130
Provides a variety of local festivals and events	**16%**	121
Has vibrant nightlife and entertainment	**13%**	135
Is a trendy destination	**13%**	130

CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

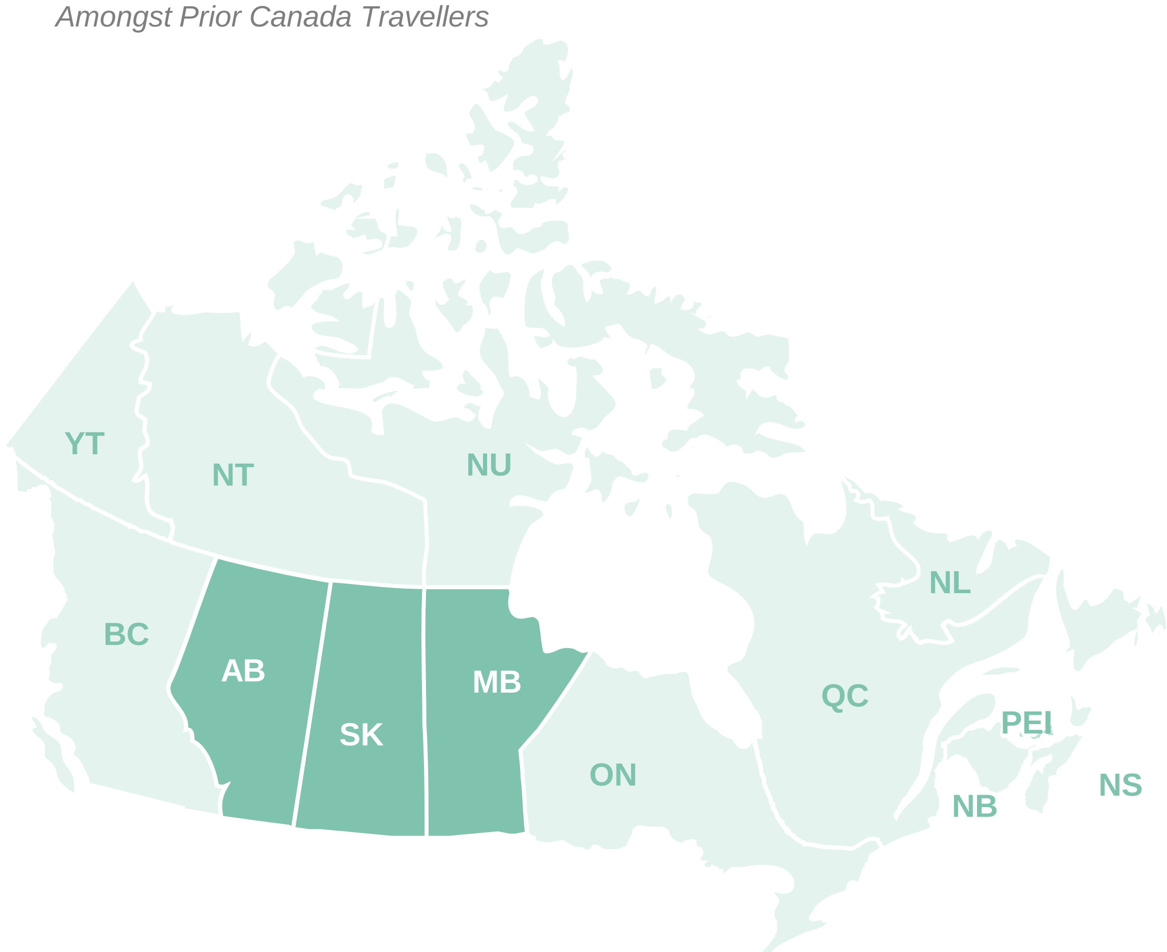
- Not many of us have visited Canada before, and if we have been, it was only one time.
- Top provinces visited include Ontario, Alberta and British Columbia.
- Future trip interests may be Toronto and Montreal.

WHERE DO WE WANT TO GO IN CANADA

MONTREAL NIAGARA FALLS VANCOUVER OTTAWA TORONTO QUEBEC GRAVENHURST ALBERTA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	38%	143
BC	37%	107
MB	11%	130
NB	0%	74
NL	0%	66
NS	0%	62
NT	0%	63
NU	0%	66
ON	38%	90
PEI	0%	64
QC	22%	85
SK	15%	153
YT	0%	70

CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- When we have visited, it has been from May to September.
- We would consider Canada for a trip, but perhaps not in the near future.

CANADA TRAVEL MONTHS ON A PAST TRIP

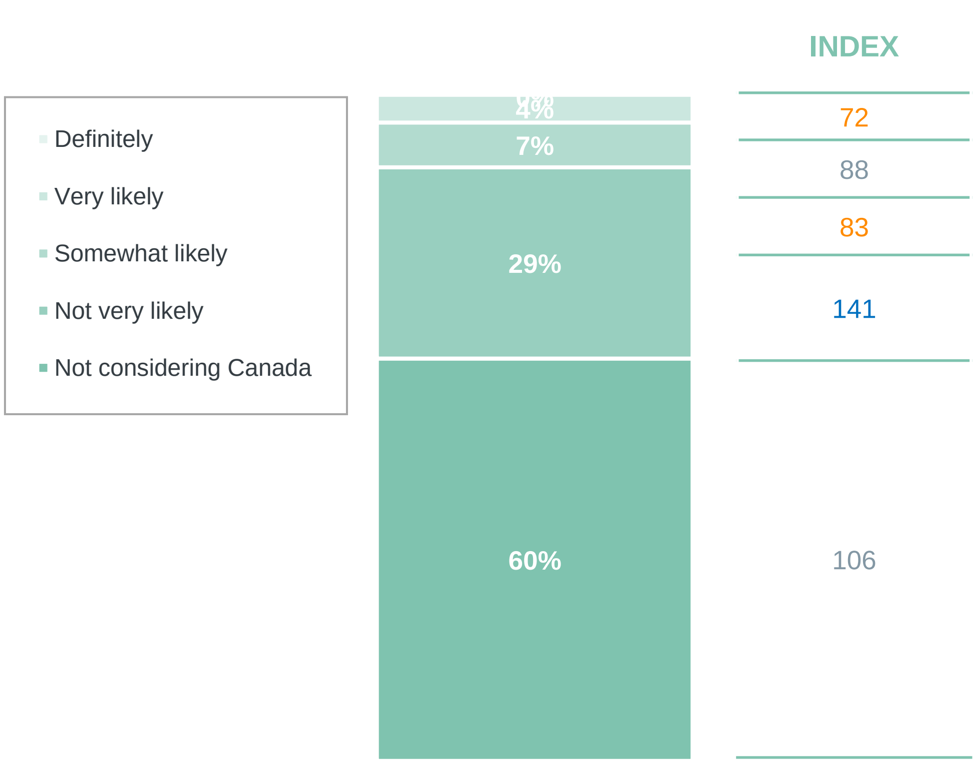
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	**0%**	**25%**	**60%**	**26%**
VS. TOTAL MARKET	12%	30%	48%	26%

4%

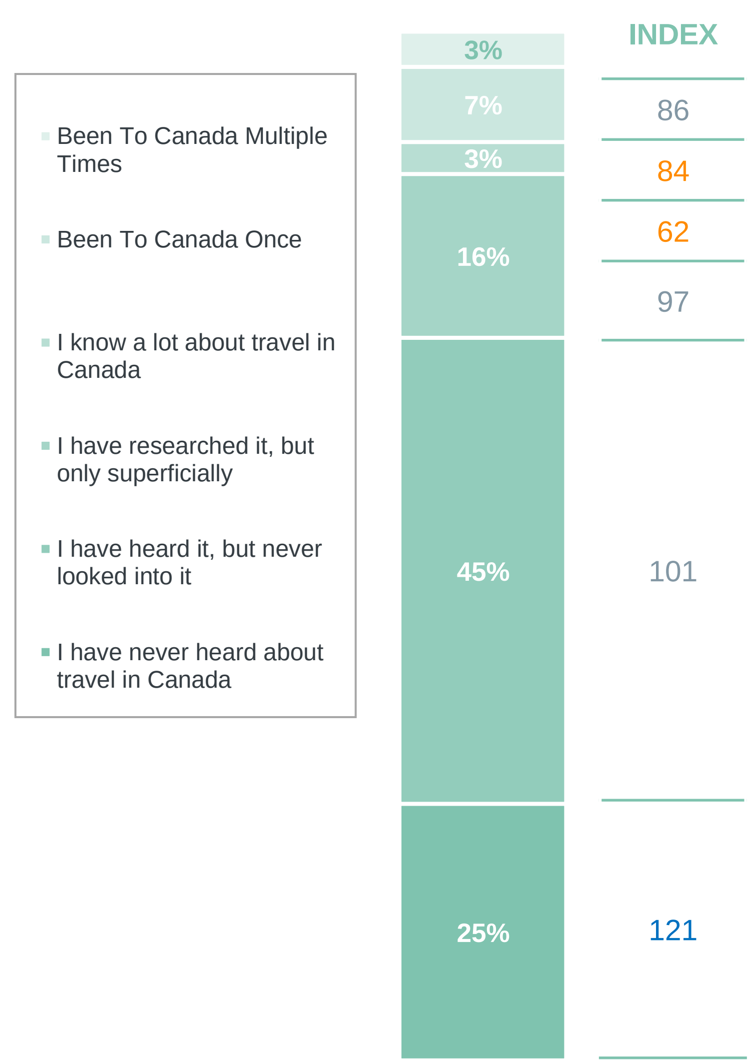
Been to Canada in last 5 years

83 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- In recent years, we've embarked on memorable leisure travels, and maybe purchased a new car.
- Some of us have started new jobs or careers, and we may have even retired.

MAJOR LIFE EVENTS IN LAST 5 YEARS

2%
Had a child
92 INDEX SCORE

27%
Started a new job / career
127 INDEX SCORE

4%
Bought a new home
95 INDEX SCORE

16%
Moved to a new city
118 INDEX SCORE

3%
Child started school
92 INDEX SCORE

36%
Purchased a car
88 INDEX SCORE

12%
Retired
110 INDEX SCORE

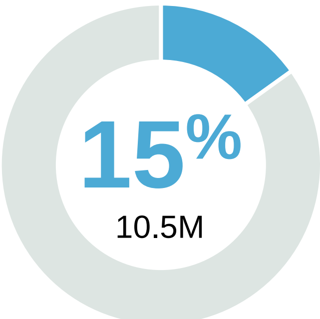
14%
Renovated house
85 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**54%**	86
Experiences (e.g., concerts, events).	**42%**	140
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**40%**	84
Fashion and accessories	**38%**	138
Personal care and wellness	**35%**	102
Savings and investments	**34%**	66

SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



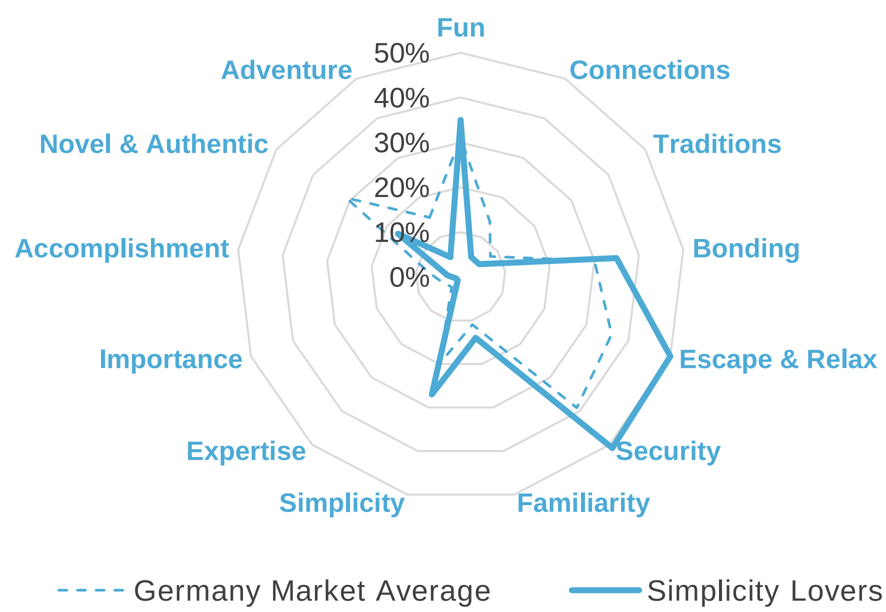
% OF GERMANY POPULATION

We seek peace, relaxation, and familiarity in our journeys, preferring easy and affordable destinations with a small-town feel. Prioritizing dining and nature experiences, we value simplicity and serenity. Loyal to regular destinations, we appreciate safety and ease of travel, and while we enjoy new cultures, we often stay within our comfort zone.

WHAT YOU NEED TO KNOW ABOUT ME

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

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

79

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I don't generally seek out luxury experiences while travelling	91%	127
I don't see the point of posting about my trips on social media	87%	143
Quiet, relaxed experiences are how I take care of myself on vacation	85%	133
Generally I'm not influenced by what destinations are popular or trendy at the moment	80%	136
I generally avoid places that are challenging or difficult to reach	68%	133
I generally prefer to go back to the same destinations on holiday	67%	148
It's not important to me that I come back from travels having learnt something new	58%	137
I don't consider travel to be an important milestone of growing up	55%	143
I seek out destinations that offer quiet opportunities for deep self-reflection	54%	133
I'm more interested in the present and don't focus much on the history of where I visit	53%	127
When travelling I often go to familiar restaurants, stores, and hotels that I recognize from home	39%	136
You can get to know a country without experiencing its culture	36%	128
I travel when I need to	27%	143

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To let loose and forget about day-to-day life	65%	132
To feel safe and secure	56%	139
To find much-needed time to relax	46%	132
To escape the demands of everyday life	45%	141
To feel confident travel with no surprises	21%	143
To be familiar with my surroundings	19%	127

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	76%	134
Peaceful	67%	144
Safe	65%	129
Reliable	48%	146
Familiar	42%	143
Practical	29%	137

SIMPLICITY LOVERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are generally aged 55+, likely retired.
- Our monthly incomes are moderate, or can be a little lower due to retirement, but our overall net worth is comfortable.
- Our kids are older or have moved out already. We are likely empty nesters.

AGE

	SCORE	INDEX
18-34	11%	60
35-54	24%	83
55+	65%	136
MEAN YEARS	57.2	139

HH INCOME (CAD)*

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

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	36%	71
Employed PT	11%	102
Self-employed	3%	79
Retired	40%	140

EDUCATION

	SCORE	INDEX
Primary education or less	14%	97
Secondary education	56%	125
Post-secondary education	30%	79

60%
76 Have a valid passport

GENDER

47% 88 Male

53% 112 Female

0% 87 Non-binary / Other

HOUSEHOLD

7% 84 Children <18 Living At Home*

10% 130 Children 18+ Living At Home*

43% 134 Children NOT Living At Home*

49% 104 No Children

** Option is not exclusive*

GERMANY STATE BREAKOUT

	SCORE	INDEX
Nordrhein-Westfalen	24%	121
Bayern	18%	107
Baden-Württemberg	12%	91
Niedersachsen	9%	104
Berlin	8%	103
Brandenburg	6%	141

	SCORE	INDEX
Hessen	6%	77
Rheinland-Pfalz	4%	96
Sachsen-Anhalt	3%	91
Schleswig-Holstein	3%	82
Hamburg	3%	82

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

72

TRAVEL TRADE INDEX: **GROUP**

59

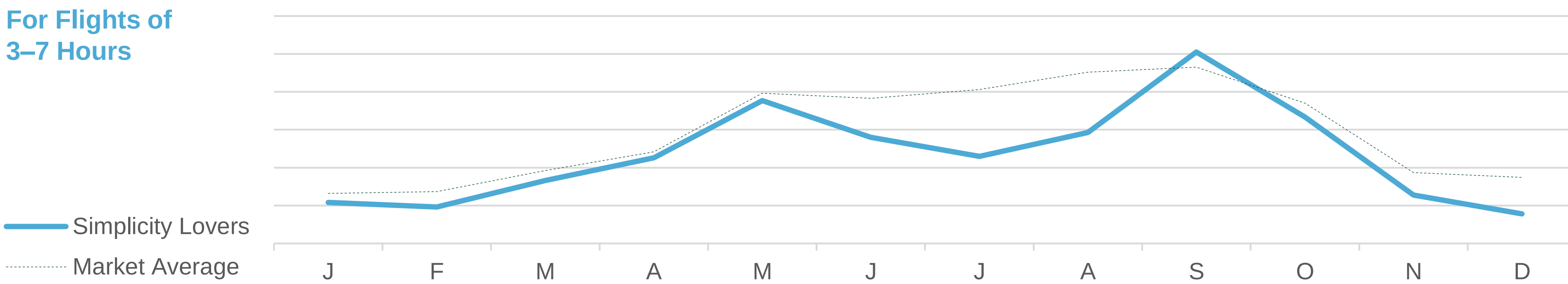
KEY terminology on this page

- **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

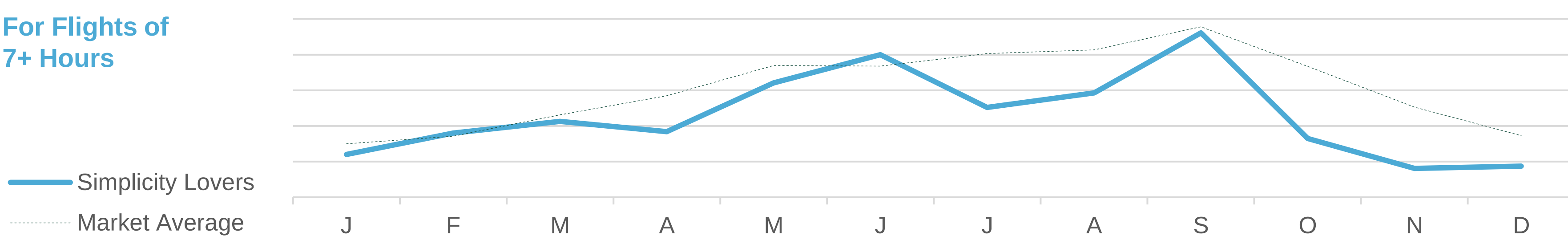
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	26%	62
3-5 Days	14%	75
1 Week Holiday	11%	86
2 Weeks Holiday	4%	77
3 Weeks Or More	2%	78

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	32%	90
International Leisure	14%	78
Business Trip	3%	73
Added Personal To Business	1%	70
Worked During Vacation	3%	84

Incidence is frequency of 2+ times per year

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	47%	98
Vacation Rental (e.g., Airbnb, Vrbo)	35%	117
Friend's or family's place	16%	131
Budget Hotel	13%	98
Premium Hotel	12%	85
All-inclusive resort	12%	79

THOUGHTS ON INDIGENOUS TRAVEL

37%

75 INDEX SCORE

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

3%

74 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	64%	72
I'm open to travelling to destinations with limited tourist infrastructure	59%	101
I really want to learn about the history of the destinations I visit	47%	73
I like to explore places that are off the beaten path and less explored	46%	82
I'm willing to put in the effort while travelling in order to see lesser-known places	36%	80
I'm open to visiting destinations with challenging climates or weather conditions	26%	78

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	70%	116
Adult relatives	17%	122
Solo	14%	95
Friends	9%	84
Kids	7%	91

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,130

69
INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	57%	103
I consider the impact that I personally have on the destinations I visit	40%	87
It's important to me that I visit somewhere that is open to diversity and inclusion	35%	87
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	27%	76
Hearing from underrepresented communities is an important part of travelling	19%	72

33%

PRIORITIZE SUSTAINABLE TRAVEL

83 INDEX SCORE

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

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

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Our activities are low-impact, including sightseeing in nature and spa experiences.
- We like to get outside for walks and appreciate beaches and lakes.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	**62%**	113
○ Oceanside beaches	**41%**	122
○ Nature walks	**40%**	126
○ Spring blossoms	**11%**	116
Local cuisine	**56%**	113
○ Local restaurants	**51%**	119
○ Cafés or bakeries	**22%**	116
Health and wellness	**31%**	112
○ Outdoor hot tub or bath	**17%**	107
○ Spas	**15%**	111
Shopping	**29%**	98
○ Visiting famous shopping centres or areas	**13%**	89
○ Outdoor markets	**10%**	83
Casual sports	**17%**	98
○ Casual biking	**11%**	99
○ Other casual sports	**6%**	110
Cultural experiences or attractions	**40%**	75
Family-focussed attractions	**21%**	93
Guided tours	**12%**	65
Overnight experiences	**10%**	72
Festivals and events	**10%**	77
Water-based sports	**6%**	73
Winter-based sports	**4%**	75

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	89%	146	84%	142
To spend time with family	41%	109	40%	112
To escape from routine	36%	125	26%	110
To be pampered	50%	136	44%	128
To have fun with friends	23%	114	27%	122
For personal reflection and growth	6%	74	18%	105
To learn through other cultures	16%	66	27%	54
For a romantic getaway	6%	78	9%	86
To seek solitude and isolation	9%	93	8%	102

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	44%	80	46%	102
Visiting friends / family	20%	87	27%	94
Family / friends wanted to go	26%	90	24%	109
Special event (e.g., wedding, reunion)	14%	88	7%	72
Festival or event	9%	76	3%	69
Kids wanted to go	11%	88	11%	98

15% 89 INDEX SCORE

Travel aligns with children's school schedule

18% 86 INDEX SCORE

Take time off for vacation during major holidays

7% 60 INDEX SCORE

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

SIMPLICITY LOVERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

44%

Primary Trip Planner

73
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	Timeline	FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	**Started Researching and Planning – 6.6 months** ○ Travel guidebooks ○ Travel agents
	6 MONTHS BEFORE MY TRIP	**Booked Transportation – 5 months** ○ Through a tour operator **Booked Accommodation – 4.8 months** ○ Through a tour operator
Started Researching and Planning – 4.7 months ○ Travel review sites	**5 MONTHS** BEFORE MY TRIP	
Booked Accommodation – 4 months ○ Through a tour operator **Booked Transportation – 3.7 months** ○ Direct with company	**4 MONTHS** BEFORE MY TRIP	**Booked Activities – 3.5 months** ○ Through a tour operator
Booked Activities – 2.8 months ○ Direct with company	**3 MONTHS** BEFORE MY TRIP	
	2 MONTHS BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips are seeking comfortable weather, and familiar dining and shopping. We are focussed on ease of travel, peace and relaxation.
- We also take some trips like City Trippers.

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

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

% OF TOTAL TRIPS 30% — 169 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only		**56%**
	Extended family		**21%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Security
ACTIVITIES	Local restaurants		**62%**
	Oceanside beaches		**39%**
	Nature walks		**25%**
KEY BEHAVIOURS	Couples trip with extended family, may be an all-inclusive destination		

% OF TOTAL TRIPS 18% — 135 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Countryside & Village		
COMPANIONS	Couple only		**52%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		**52%**
	Nature walks		**37%**
	Hiking		**27%**
KEY BEHAVIOURS	Staying in a vacation rental, slightly more active and focussed on nature experiences		

% OF TOTAL TRIPS 13% — 120 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Small Cities and Towns		
COMPANIONS	Couple only		**67%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants		**62%**
	Cafés or bakeries		**37%**
	Nature walks		**29%**
KEY BEHAVIOURS	May be booked more last minute. Relaxing and seeking convenience		

% OF TOTAL TRIPS 11% — 112 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Urban Centre		
COMPANIONS	Non-family only		**33%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Security
ACTIVITIES	Visiting famous shopping centres		**31%**
	Bars and pubs		**31%**
	Street cuisine		**15%**
KEY BEHAVIOURS	A couples trip with friends to visit a trendy city where friends live		

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, or elsewhere in Europe.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Germany	44%	141
Spain	10%	106
Italy	8%	108
Austria	7%	126
Netherlands	5%	139

	SCORE	INDEX
Poland	4%	136
Greece	3%	63
France	3%	70
Denmark	3%	103
Croatia	2%	92

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Isn't too crowded	69%	137
Is not too expensive	65%	127
Is easy to travel to	56%	138
Has a mild and pleasant climate	51%	133
Doesn't take too long to get there	41%	147
Language is not a barrier	41%	138
Is easy to travel around once there	40%	131
Has a small town feel	17%	138

SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

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

WHERE DO WE WANT TO GO IN CANADA

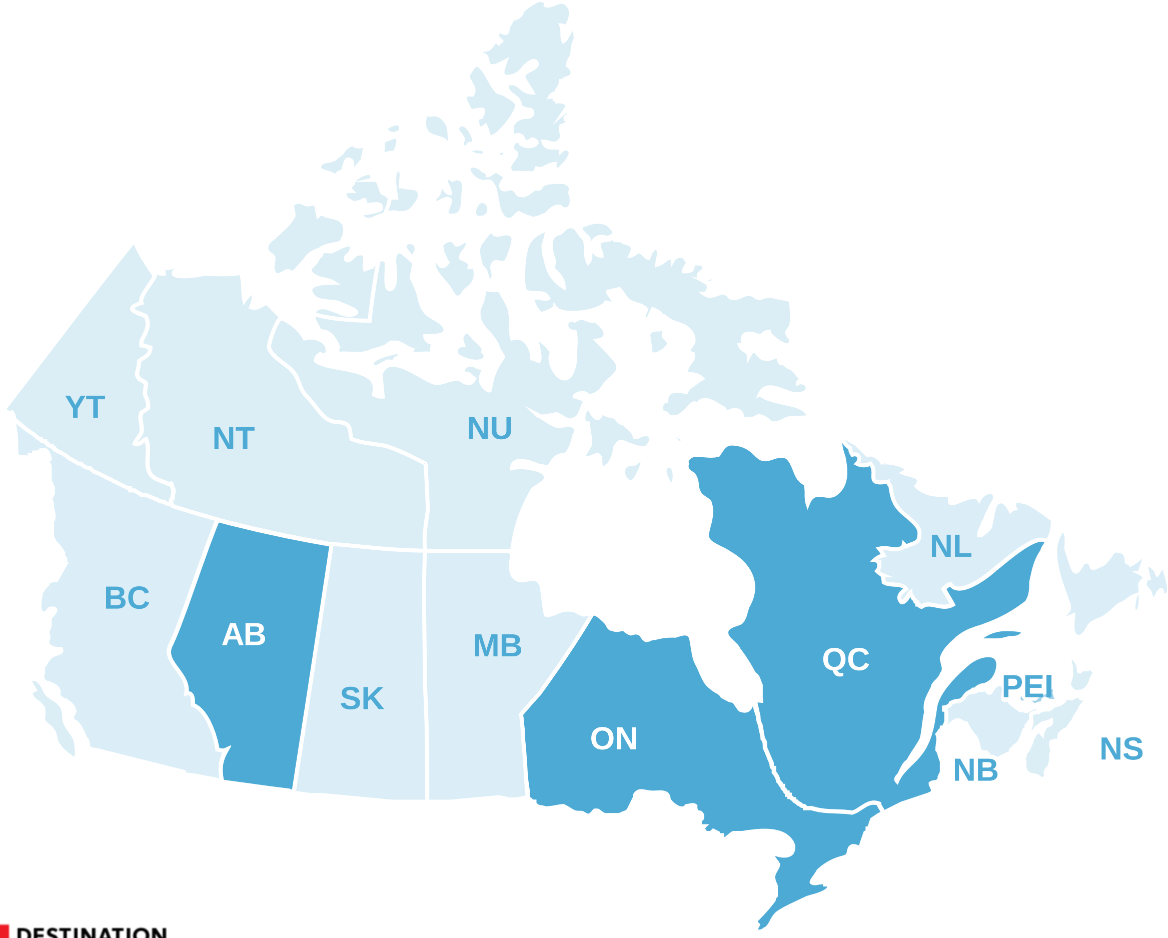
QUEBEC

OTTAWA

ROCKY MOUNTAINS

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	33%	133
BC	32%	88
MB	0%	67
NB	0%	74
NL	0%	66
NS	5%	79
NT	5%	101
NU	0%	66
ON	54%	136
PEI	5%	108
QC	41%	142
SK	4%	87
YT	4%	93

DESTINATION CANADA

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

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

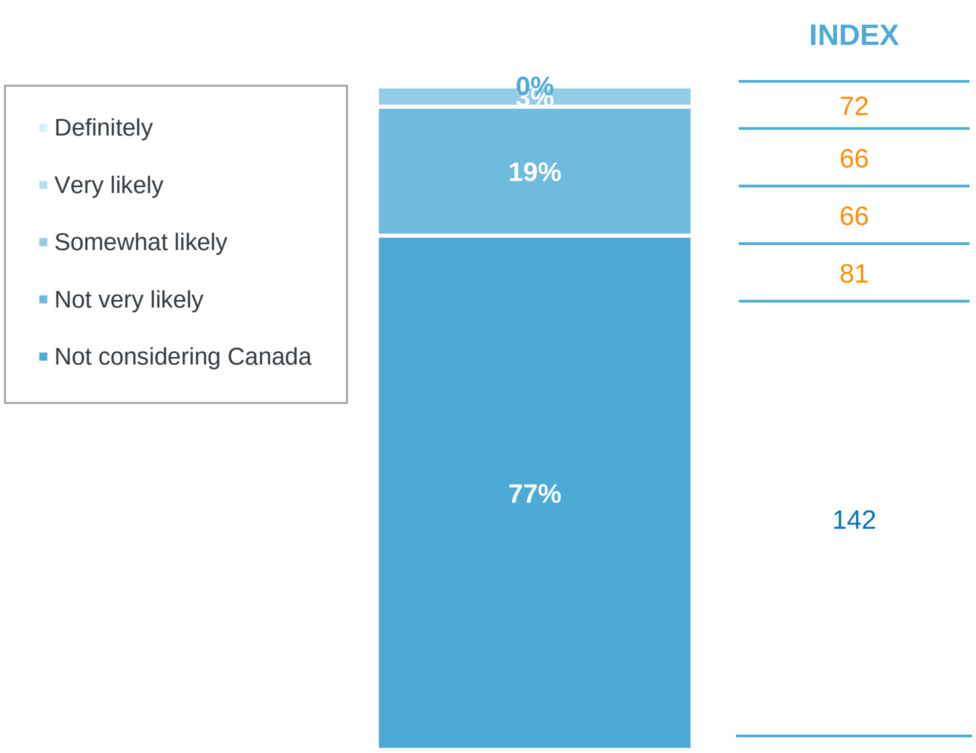
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	**4%**	**26%**	**59%**	**36%**
VS. TOTAL MARKET	12%	30%	48%	26%

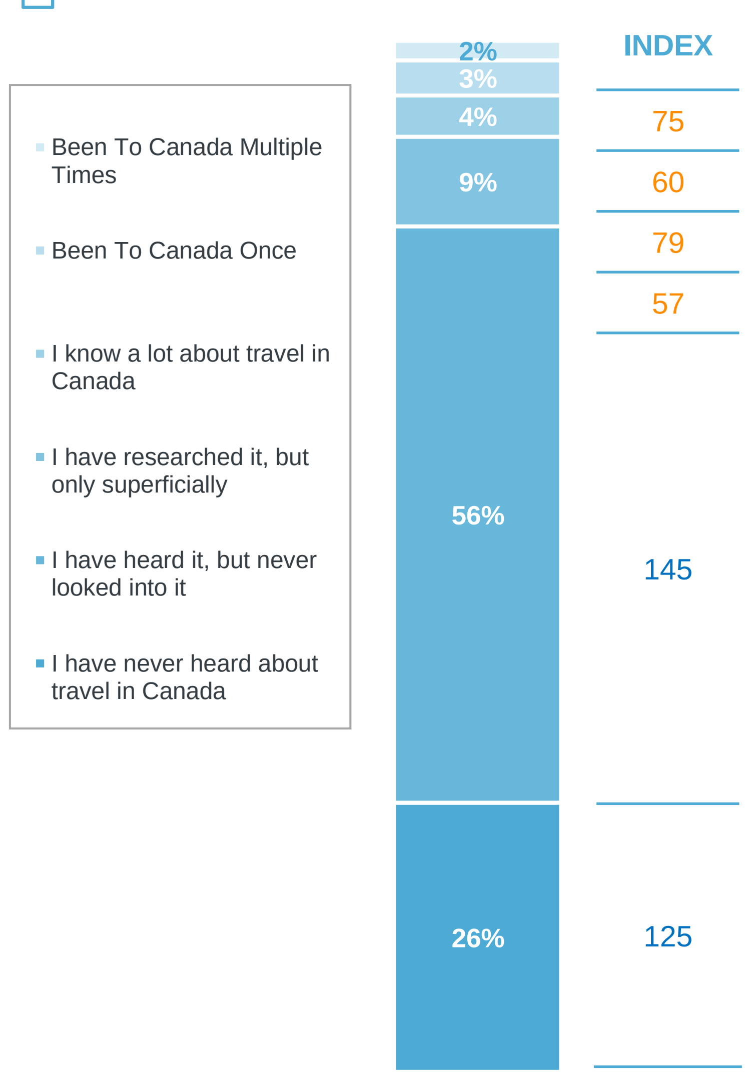
1% Been to Canada in last 5 years

66 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 hobbies, self-care, and continuing to build our savings.

MAJOR LIFE EVENTS IN LAST 5 YEARS

1%
Had a child
90 INDEX SCORE

17%
Started a new job / career
71 INDEX SCORE

2%
Bought a new home
76 INDEX SCORE

11%
Moved to a new city
57 INDEX SCORE

1%
Child started school
86 INDEX SCORE

32%
Purchased a car
67 INDEX SCORE

17%
Retired
140 INDEX SCORE

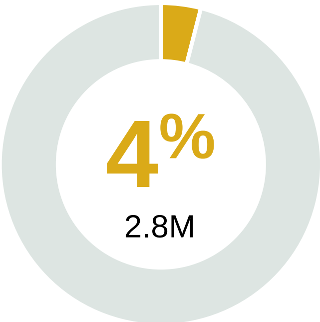
10%
Renovated house
57 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	52%	81
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	48%	121
Savings and investments	44%	130
Personal care and wellness	42%	141
Home and decor	30%	102
Experiences (e.g., concerts, events).	27%	76

FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF GERMANY POPULATION

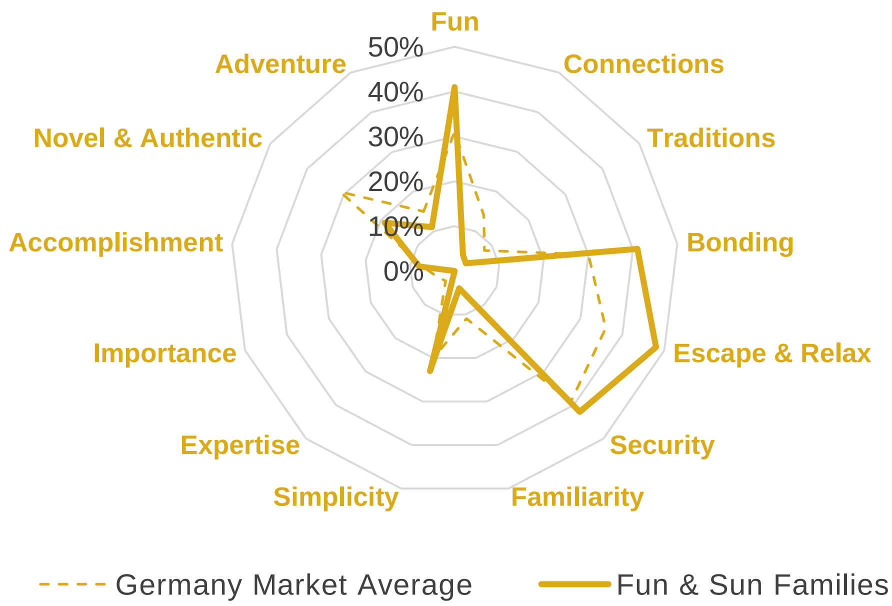
We cherish relaxation and shared family experiences in familiar, kid-friendly, and affordable destinations. We prioritize fun and simplicity over extravagance, gravitating towards well-known beaches and local spots with good communication standards.

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 outdoor experiences in nature.
3. We plan our annual 1-week vacation a few months in advance, relying on booking and review sites/apps and recommendations.
4. While we mostly travel close to home on quick getaways, we take periodic international trips.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

68

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

77

How is this calculated?

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

FUN & SUN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally don't go out of my way to seek out perspectives from underrepresented communities	79%	123
I generally only choose destinations with comfortable climate and weather conditions	76%	128
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	73%	124
While travelling I generally stick to places that are direct and convenient to get to	73%	133
I generally avoid places that are challenging or difficult to reach	71%	137
I generally don't try to learn local languages	70%	140
I appreciate diversity but not likely engage deeply with Indigenous cultures	70%	138
I tend to choose a destination to visit based off value for money	69%	142
I will generally not go out of my way to buy local when travelling	62%	147
I try to keep a strict budget when I go on holiday	60%	138
It's not important to me that I come back from travels having learnt something new	58%	137
I'm more interested in the present and don't focus much on the history of where I visit	55%	131
You can get to know a country without experiencing its culture	40%	140

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	61%	123
To let loose and forget about day-to-day life	61%	123
To share quality time with others	53%	142
To find much-needed time to relax	50%	141
To escape the demands of everyday life	38%	122
To bond through shared experiences	30%	135

DESIRED DESTINATION

	SCORE	INDEX
Friendly	72%	128
Relaxed	72%	126
Safe	65%	129
Carefree	39%	125
Practical	28%	135
Trendy	8%	133

FUN & SUN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are aged 35-54, with more than one child.
- We are likely to be female.
- We are primarily employed earning a modest income or working as full-time parents.

AGE

	SCORE	INDEX
18-34	22%	90
35-54	59%	157
55+	19%	64
MEAN YEARS	44.0	74

HH INCOME (CAD)*

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

* HH Income reported by month

EMPLOYMENT

	SCORE	INDEX
Employed FT	34%	66
Employed PT	26%	157
Self-employed	3%	73
Retired	13%	70

EDUCATION

	SCORE	INDEX
Primary education or less	14%	95
Secondary education	56%	124
Post-secondary education	30%	81

53%
60 Have a valid passport

GENDER

34% 49 Male

66% 151 Female

0% 87 Non-binary / Other

HOUSEHOLD

77% 147 Children <18 Living At Home*

5% 67 Children 18+ Living At Home*

17% 71 Children NOT Living At Home*

6% 50 No Children

** Option is not exclusive*

GERMANY STATE BREAKOUT

	SCORE	INDEX
Nordrhein-Westfalen	19%	71
Baden-Württemberg	17%	146
Sachsen-Anhalt	11%	150
Bayern	9%	39
Schleswig-Holstein	7%	152
Niedersachsen	7%	82

	SCORE	INDEX
Rheinland-Pfalz	6%	138
Hessen	5%	71
Brandenburg	5%	125
Berlin	5%	65
Hamburg	4%	136

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

81

TRAVEL TRADE INDEX: **GROUP**

88

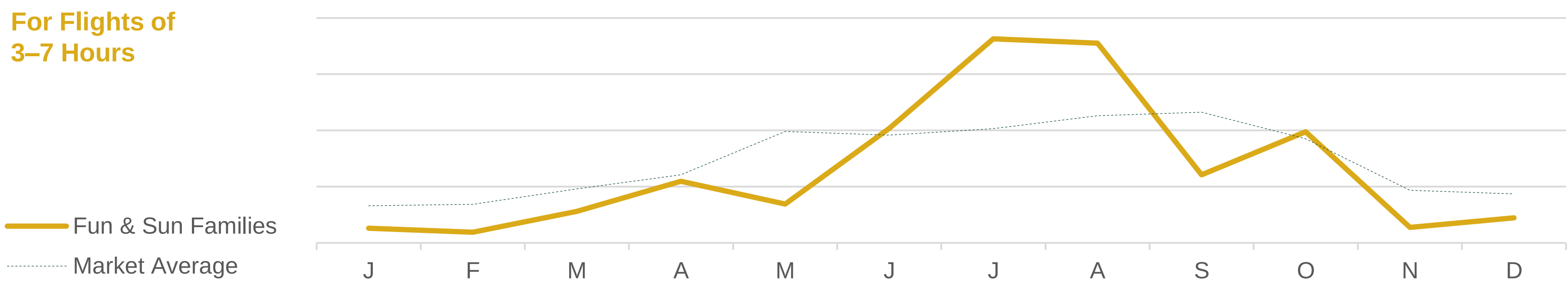
KEY terminology on this page

- **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

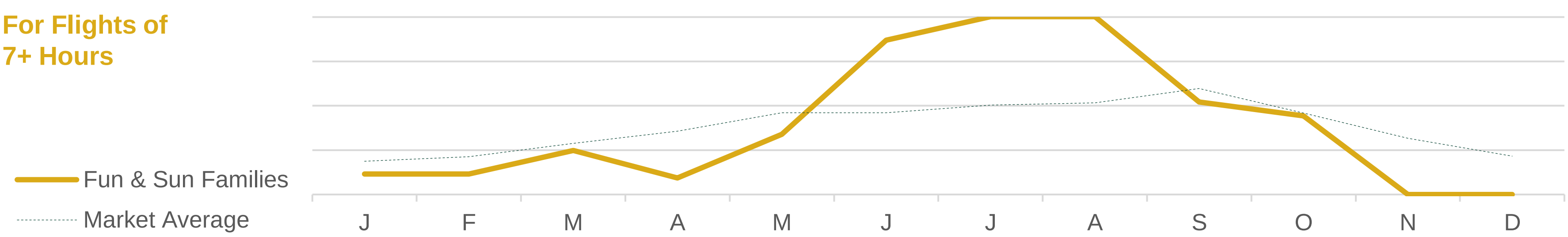
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	27%	66
3-5 Days	13%	72
1 Week Holiday	6%	59
2 Weeks Holiday	0%	59
3 Weeks Or More	2%	78

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	31%	81
International Leisure	5%	54
Business Trip	5%	79
Added Personal To Business	3%	80
Worked During Vacation	0%	66

Incidence is frequency of 2+ times per year

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**42%**	81
Vacation Rental (e.g., Airbnb, Vrbo)	**41%**	137
All-inclusive resort	**24%**	131
Budget Hotel	**15%**	109
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**15%**	156
Friend's or family's place	**13%**	104

THOUGHTS ON INDIGENOUS TRAVEL

30%

62 INDEX SCORE

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

4%

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	**60%**	60
I'm open to travelling to destinations with limited tourist infrastructure	**47%**	76
I really want to learn about the history of the destinations I visit	**45%**	69
I like to explore places that are off the beaten path and less explored	**42%**	76
I'm willing to put in the effort while travelling in order to see lesser-known places	**27%**	67
I'm open to visiting destinations with challenging climates or weather conditions	**24%**	72

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Kids	75%	149
Spouse / Partner	73%	125
Adult relatives	19%	145
Friends	7%	77
Solo	4%	65

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,740

86
INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	38%	53
I consider the impact that I personally have on the destinations I visit	38%	83
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	27%	76
It's important to me that I visit somewhere that is open to diversity and inclusion	26%	69
Hearing from underrepresented communities is an important part of travelling	21%	77

25%

PRIORITIZE SUSTAINABLE TRAVEL

69 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 the outdoors in a variety of activities the whole family can enjoy.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focussed attractions	80%	153
○ Amusement parks or theme parks	67%	155
○ Zoos or aquariums	67%	155
○ Space or science centres	8%	137
Shopping	35%	111
○ Souvenir shopping	19%	129
○ Visiting famous shopping centres or areas	17%	100
Casual sports	21%	118
○ Casual biking	13%	112
○ Fishing	9%	155
Winter-based sports	15%	122
○ Snowboarding or downhill skiing	10%	127
○ Snowshoeing or cross-country skiing	3%	107
Nature experiences	52%	92
○ Oceanside beaches	38%	112
○ See or explore lakes, rivers, or waterfalls	32%	110
Local cuisine	40%	69
Cultural experiences or attractions	35%	63
Health and wellness	25%	83
Guided tours	12%	68
Festivals and events	12%	81
Overnight experiences	11%	77
Water-based sports	8%	85

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	71%	108	46%	63
To spend time with family	66%	144	76%	156
To escape from routine	48%	152	48%	164
To be pampered	27%	91	36%	115
For adventure and excitement	20%	95	34%	112
To have fun with friends	18%	100	7%	76
To learn through other cultures	16%	66	28%	58
To check off dream travel places	14%	97	16%	87
For personal reflection and growth	5%	71	0%	53

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	66%	136	67%	147
Kids wanted to go	58%	142	45%	150
Family / friends wanted to go	47%	138	50%	156
Visiting friends / family	21%	89	39%	129
Special event (e.g., wedding, reunion)	13%	85	26%	152
Festival or event	4%	58	19%	102

70% 150 INDEX SCORE

Travel aligns with children's school schedule

59% 151 INDEX SCORE

Take time off for vacation during major holidays

10% 85 INDEX SCORE

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

FUN & SUN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

37%

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**		FLIGHT OF **7+ HOURS**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
Started Researching and Planning – 4.4 months - Travel agents - Travel review sites	**5 MONTHS** BEFORE MY TRIP	
Booked Accommodation – 4.2 months - Travel booking sites/apps	**4 MONTHS** BEFORE MY TRIP	*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.
Booked Transportation – 3.9 months - Travel booking sites/apps	**3 MONTHS** BEFORE MY TRIP	
	2 MONTHS BEFORE MY TRIP	
Booked Activities – 1.5 months - Travel booking sites/apps	**1 MONTH** BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips feature beaches and destinations known for family attractions.
- We also take trips like 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 28% 166 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		**64%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Souvenir shopping		**47%**
	Zoos or aquariums		**40%**
	Amusement parks or theme parks		**31%**
KEY BEHAVIOURS	Planned in advance, all-inclusive resort, fun and safe destination		

% OF TOTAL TRIPS 22% 147 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Countryside & Village		
COMPANIONS	Nuclear family with kids		**61%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Local restaurants		**41%**
	Nature walks		**38%**
	Hiking		**33%**
KEY BEHAVIOURS	Exploring nature in a quiet and calm environment		

% OF TOTAL TRIPS 10% 111 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		**67%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants		**62%**
	Cafés or bakeries		**37%**
	Nature walks		**29%**
KEY BEHAVIOURS	May be booked more last minute. Relaxing and seeking convenience		

% OF TOTAL TRIPS 18% 102 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Extended Family		
DESTINATION TYPE	Beach resort		**39%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants		**48%**
	Nature walks		**29%**
	Oceanside beaches		**25%**
KEY BEHAVIOURS	Repeat visit to a safe and reliable destination for the whole family		

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are kid-friendly, easy to access, and offer packages to make our lives easier.
- We take shorter trips, mostly domestic, or elsewhere in Europe.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Germany	40%	129
Spain	6%	64
Austria	6%	102
Croatia	6%	157
Greece	5%	120

	SCORE	INDEX
Italy	5%	60
Denmark	4%	141
France	4%	88
Netherlands	4%	120
Turkey	4%	151

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	86%	147
Is not too expensive	68%	131
Isn’t too crowded	55%	115
Is easy to travel to	45%	123
Is easy to travel around once there	38%	127
Language is not a barrier	36%	125
Good connectivity (Wi-Fi, cell service, etc.)	34%	132
Has packaged holiday / vacation offers	21%	136

FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

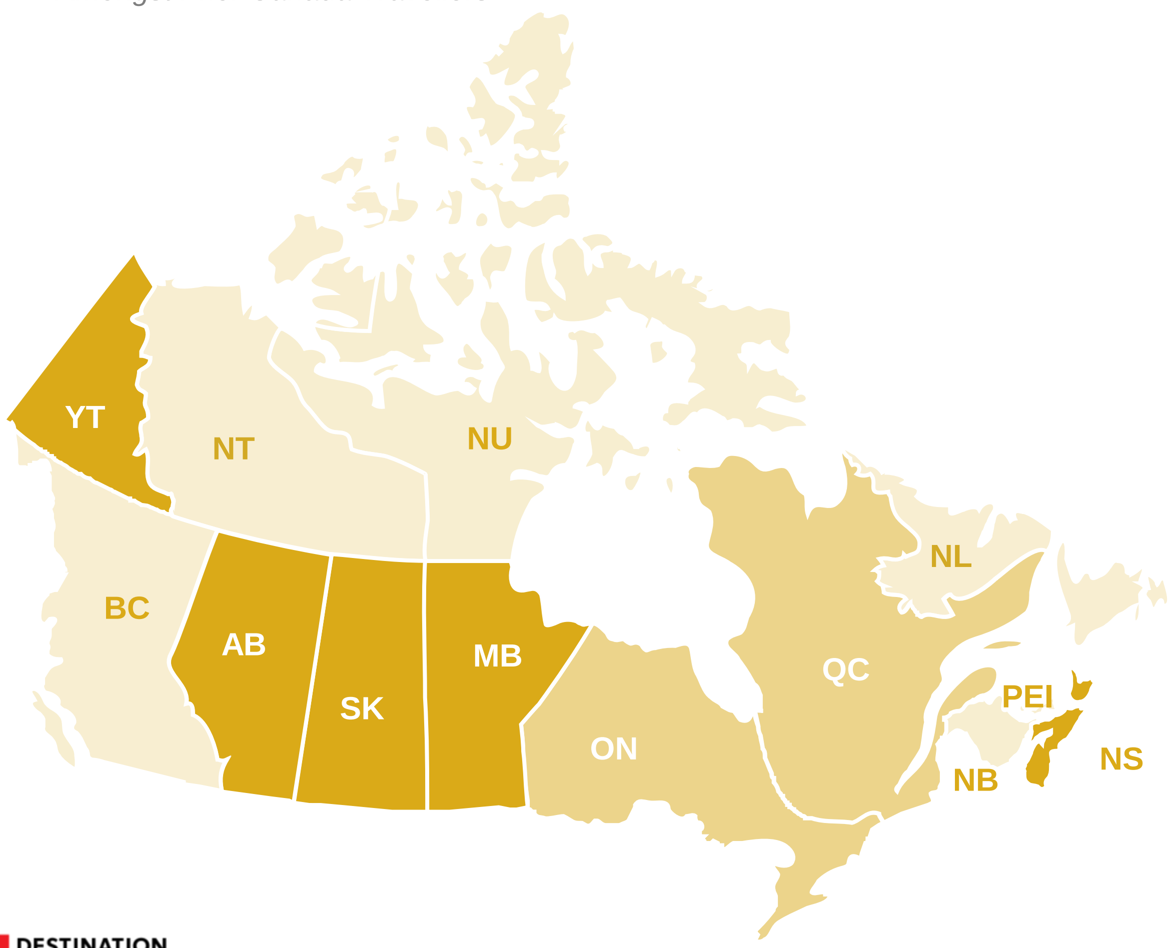
- We likely haven't been to Canada before, although we have heard about a few travel destinations and experiences.
- To date, any travel to Canada has primarily been to Ontario or Quebec.

WHERE DO WE WANT TO GO IN CANADA

QUEBEC

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	32%	129
BC	21%	40
MB	10%	125
NB	10%	106
NL	0%	66
NS	21%	138
NT	0%	63
NU	0%	66
ON	47%	116
PEI	0%	64
QC	34%	122
SK	10%	127
YT	10%	130

DESTINATION CANADA

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

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

CANADA TRAVEL MONTHS ON A PAST TRIP

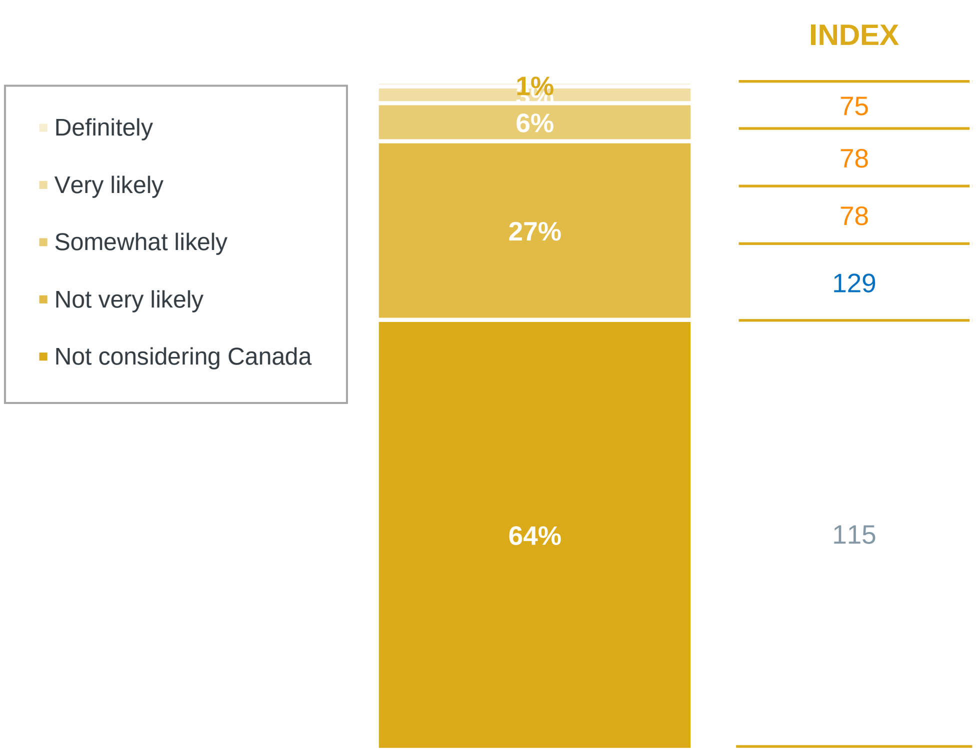
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	**10%**	**35%**	**55%**	**11%**
VS. TOTAL MARKET	12%	30%	48%	26%

3%

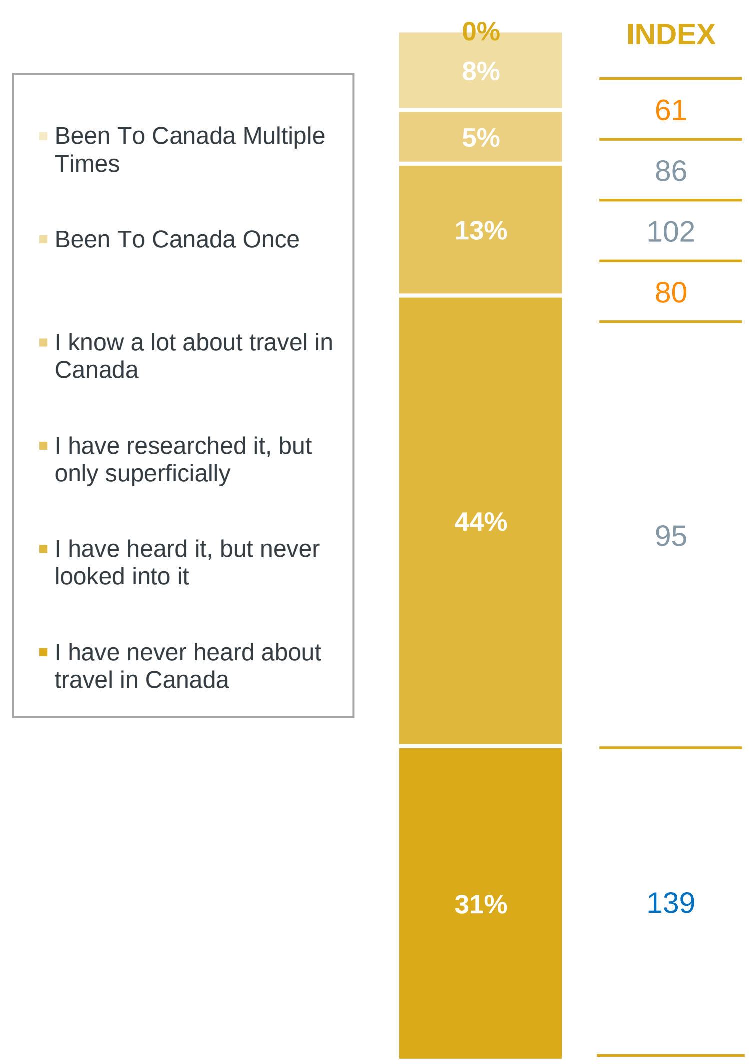
Been to Canada in last 5 years

78 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



FUN & SUN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

34%
Had a child
153 INDEX SCORE

24%
Started a new job / career
108 INDEX SCORE

8%
Bought a new home
139 INDEX SCORE

15%
Moved to a new city
105 INDEX SCORE

21%
Child started school
142 INDEX SCORE

46%
Purchased a car
133 INDEX SCORE

9%
Retired
91 INDEX SCORE

17%
Renovated house
105 INDEX SCORE

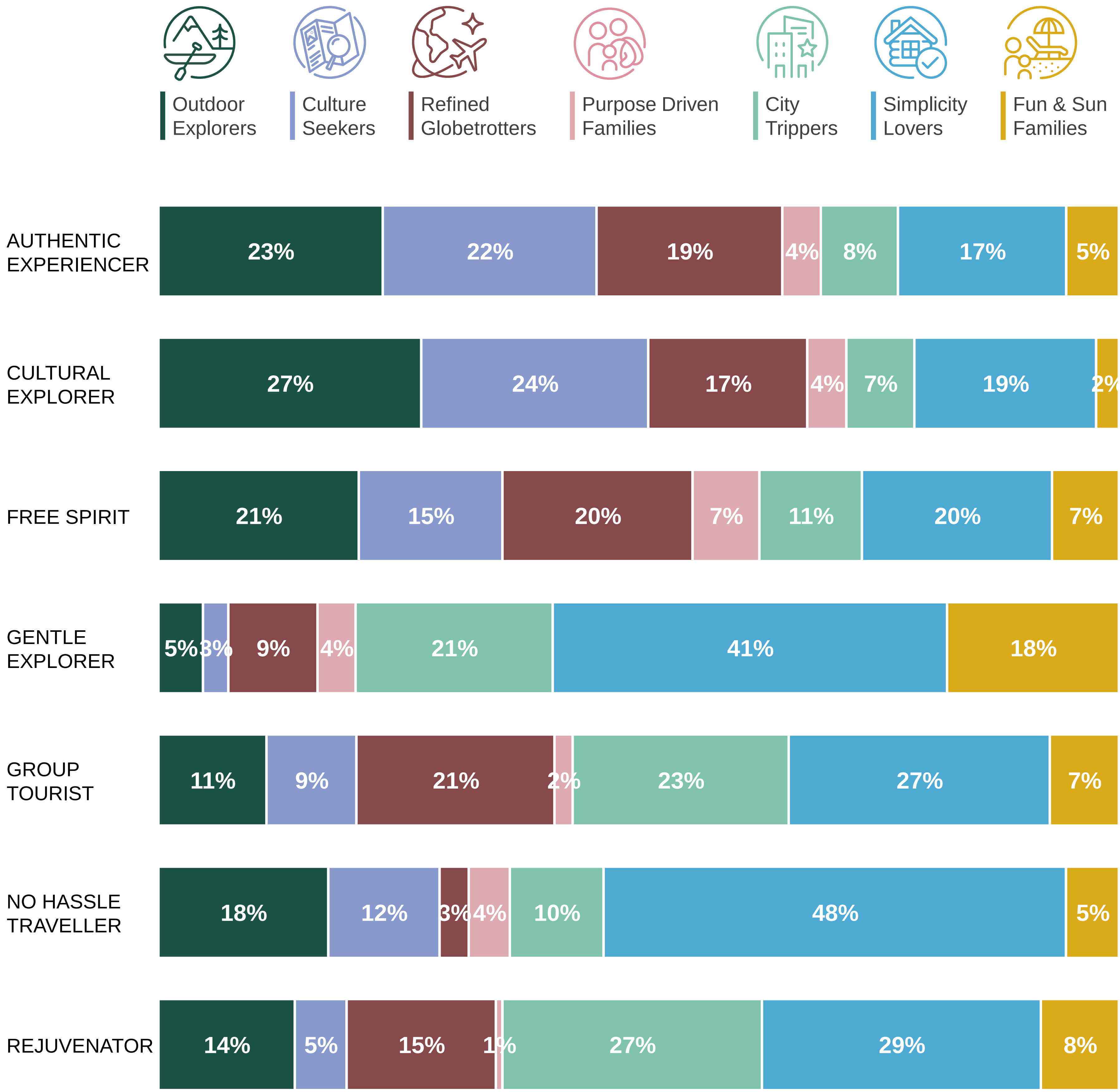
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	47%	64
Home and decor	45%	155
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	42%	96
Savings and investments	41%	111
Fashion and accessories	37%	132
Personal care and wellness	36%	110

EXPLORER QUOTIENT MAPPING

MARKET LEVEL SEGMENT DISTRIBUTION ACROSS EQ SEGMENTS

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



GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

DETAILS AND DEFINITIONS

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