JAPAN MARKET PROFILES

As one of Asia's most vibrant and culturally rich travel markets, Japanese travellers are drawn to destinations that offer a blend of escape and excitement.

Japanese travellers look to relax in destinations that are free-spirited and carefree which offer dynamic cultural scenes, where they can fully immerse themselves in the buzz and energy of local life while enjoying a much-needed break from their busy routines.

JAPAN

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

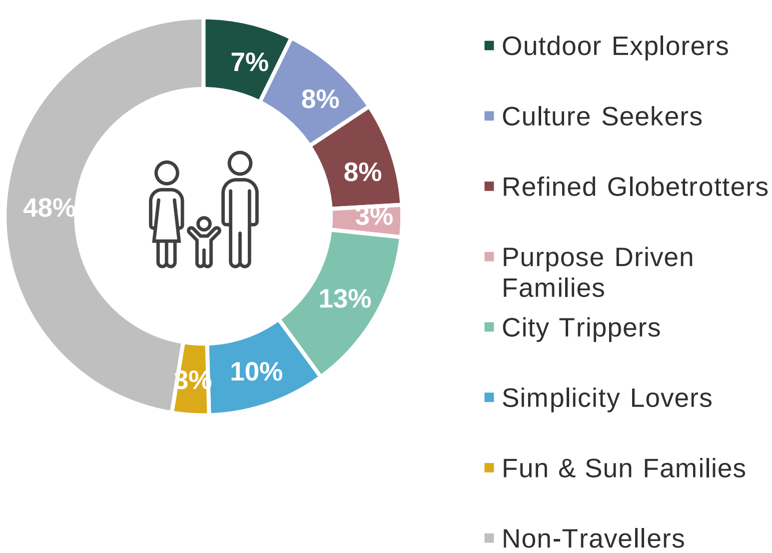
- Often visit urban centres, or remote destinations with access to nearby cities, which allows for exploration of famous shopping options and renowned culinary experiences.
- Overall preference for reliable, safe, and well-known destinations and interest in trendy locales.
- Interested in many distractions and activities, especially if they are trendy or bucket-list items. Whether active or low-impact, participating in activities is important.

The Japanese market overindexes for City Trippers and non-travellers. There is a general preference for destinations with developed infrastructure that offer luxury experiences, such as premium dining, high-end shopping, and opportunities for health and wellness.

Travellers from Japan value a mix of local cuisine, overnight experiences, and cultural attractions, seeking destinations that combine fun with a touch of elegance.

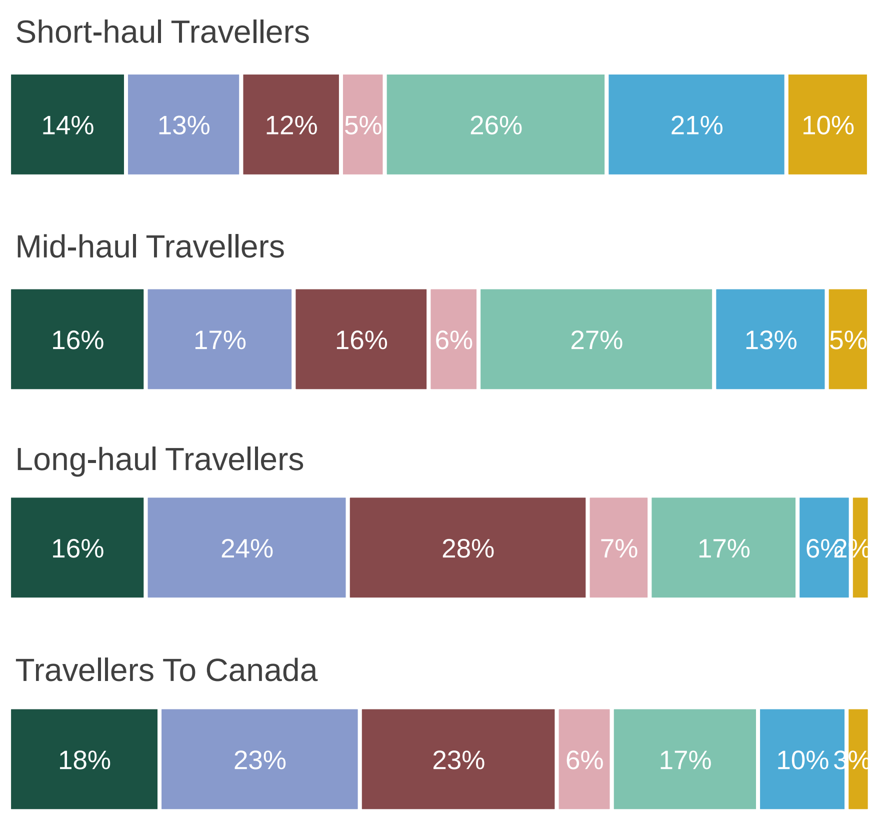
MARKET SIZING

POPULATION BREAKDOWN



47.4% of the adult population in Japan (est. **105M**) are non-travellers (est. **49M**). Reasons for not travelling are often financial or feeling uncomfortable due to health risks like Covid.

OUTBOUND TRAVELLERS' BREAKDOWN



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

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

MARKET SEGMENTS OVERVIEW

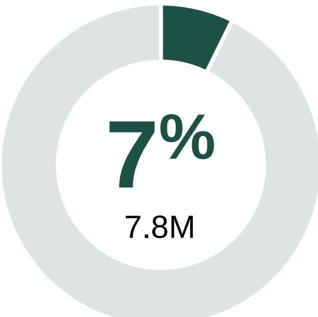
	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	**7.8M**	No	○ Nature Experiences ○ Overnight Experiences ○ Winter Sports	○ Novel & Authentic ○ Adventure ○ Expertise
CULTURE SEEKERS	**9.0M**	No	○ Cultural Experiences & Attractions ○ Festivals & Events ○ Cuisine	○ Novel & Authentic ○ Connections ○ Traditions
REFINED GLOBETROTTERS	**8.9M**	**Yes**	○ Cuisine ○ Cultural Experiences & Attractions ○ Overnight Experiences	○ Bonding ○ Novel & Authentic ○ Security
PURPOSE DRIVEN FAMILIES	**2.7M**	No	○ Cuisine ○ Family-Focused Attractions ○ Shopping	○ Bonding ○ Novel & Authentic ○ Escape & Relax
CITY TRIPPERS	**13.7M**	No	○ Cuisine ○ Shopping ○ Cultural Experiences & Attractions	○ Fun ○ Escape & Relax ○ Simplicity
SIMPLICITY LOVERS	**10.0M**	No	○ Cuisine ○ Health & Wellness ○ Cultural Experiences & Attractions	○ Escape & Relax ○ Simplicity ○ Fun
FUN & SUN FAMILIES	**3.1M**	No	○ Family-Focused Attractions ○ Shopping ○ Cuisine	○ Escape & Relax ○ Fun ○ Bonding

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 JAPAN POPULATION

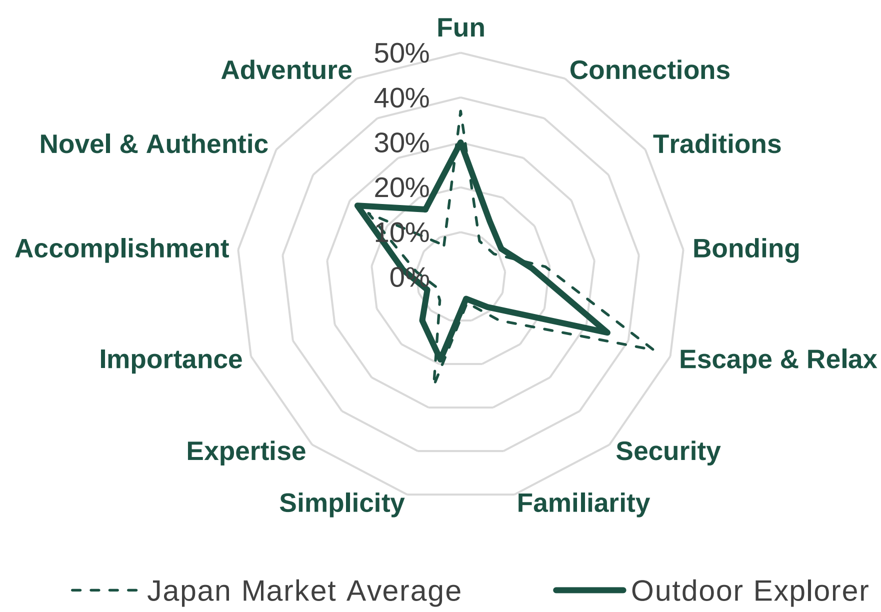
We are daring explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

We often seek accomplishment through physical activities, 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 is our version of self-care.
4. We like to get off the beaten path, open to exploring without an agenda and staying flexible.

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

104

How is this calculated?

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

OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We value outdoor experiences for how they make us feel, and are always on the lookout for new destinations.
- Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment.
- We prioritize adventurous, free-spirited, and unexplored destinations.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm always on the look out for new destinations to visit next	**87%**	110
I like my holiday to have some form of physical activity	**73%**	143
I generally think natural attractions are the highlights of my trip	**71%**	152
I go where I want to go, no matter the hurdles	**62%**	142
I prefer wandering around without a set agenda, even if that means missing some "famous" sites	**59%**	119
I learn the basics of a language before visiting a country / region	**59%**	120
I feel best on vacation when being highly active	**51%**	117
I'm open to unconventional accommodations when travelling	**49%**	135
I enjoy living in the moment while travelling and don't worry much about what comes next	**47%**	120
I prefer to explore quickly and cover as much ground as possible at historic sites or museums	**47%**	129
Local cuisine is not a priority for me; I focus on other aspects of travel	**33%**	141
I seek out destinations where I can explore my ancestral heritage	**33%**	131
I like to keep my travel plans flexible and often book on short notice	**25%**	141

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel a sense of adventure	**28%**	150
To have authentic experiences	**24%**	126
To feel connected with new people	**14%**	118
To feel like a travel expert	**13%**	142
To push my limits and challenge myself	**7%**	147
To be proud to share my travel experiences	**6%**	125

DESIRED DESTINATION

	SCORE	INDEX
Free-Spirited	**46%**	102
Open	**30%**	102
Adventurous	**25%**	155
Unexplored	**20%**	154
Passionate	**14%**	138
Sociable	**7%**	114

OUTDOOR EXPLORERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We represent a diverse age range, and most of us do not have children.
- We are working full-time earning a conservative income.
- We may also be self-employed.

AGE

	SCORE	INDEX
18-34	**23%**	114
35-54	**31%**	100
55+	**46%**	96
MEAN YEARS	**51.4**	94

HH INCOME (CAD)

	SCORE	INDEX
$45K or less	**21%**	100
>$45K to $100K	**66%**	101
More than $100K	**10%**	106
Refused	**3%**	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	**45%**	111
Employed PT	**11%**	79
Self-employed / Business owner	**10%**	109
Retired	**12%**	96

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	77
Secondary education	**22%**	81
Post-secondary education	**78%**	123

73%
103 Have a valid passport

GENDER

55% 115 Male

45% 85 Female

0% 80 Non-binary / Other

HOUSEHOLD

18% 99 Children <18 Living At Home*

18% 98 Children 18+ Living At Home*

22% 95 Children NOT Living At Home*

60% 103 No Children

** Option is not exclusive*

JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	**16%**	107
Kanagawa	**10%**	110
Osaka	**9%**	104
Saitama	**6%**	124
Hyogo	**6%**	136
Aichi	**5%**	81

	SCORE	INDEX
Chiba	**5%**	89
Fukuoka	**4%**	114
Shizuoka	**3%**	100
Hokkaido	**3%**	81
Kyoto	**2%**	94

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

100

TRAVEL TRADE INDEX: **GROUP**

120

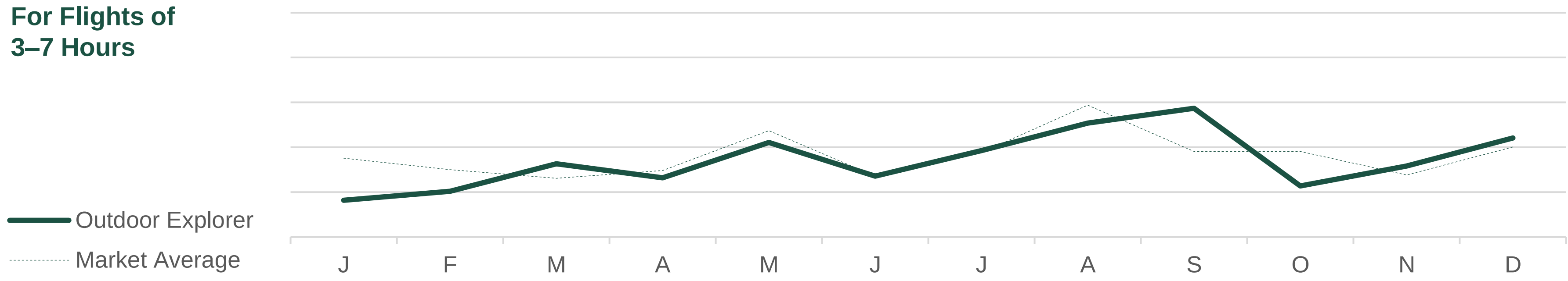
KEY terminology on this page

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

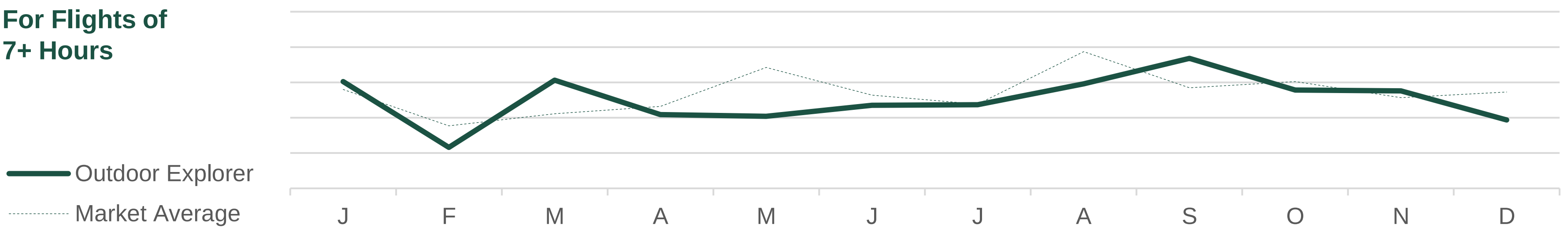
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	46%	109
3-5 Days	20%	112
1 Week Holiday	5%	123
2 Weeks Holiday	2%	111
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	49%	99
International Leisure	8%	113
Business Trip	9%	100
Added Personal To Business	6%	122
Worked During Vacation	2%	112

Incidence is frequency of 2+ times per year

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	72%	85
Budget Hotel	28%	98
Premium Hotel	16%	90
Bed & Breakfast	10%	136
Friend's or family's place	6%	63
Campsite	5%	116

THOUGHTS ON INDIGENOUS TRAVEL

59%

126 INDEX SCORE

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

10%

113 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	77%	110
I'm willing to put in the effort while travelling in order to see lesser-known places	64%	140
I like to explore places that are off the beaten path and less explored	57%	148
I'm open to travelling to destinations with limited tourist infrastructure	50%	141
You only ever get to know a country by experiencing its culture	47%	105
I'm open to visiting destinations with challenging climates or weather conditions	42%	144

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	53%	98
Solo	22%	110
Adult relatives	16%	71
Friends	11%	96
Kids	10%	96

BUDGET

AVERAGE SPEND (ALL TRIPS)

$1,660

98
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	54%	99
Hearing from underrepresented communities is an important part of travelling	47%	119
I consider the impact that I personally have on the destinations I visit	43%	114
It's important to me that I visit somewhere that is open to diversity and inclusion	43%	98
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	42%	121

36%

PRIORITIZE SUSTAINABLE TRAVEL

118 INDEX SCORE

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

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

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We seek the outdoors, adventuring in nature and exploring all types of sports.
- Overnight experiences offering exploration or retreats are also of interest.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	**60%**	153
○ Nature walks	**34%**	148
○ See or explore lakes, rivers, or waterfalls	**30%**	150
○ Visiting nature parks or preserves	**26%**	146
Overnight experiences	**33%**	125
○ Train trip	**17%**	117
○ Staying at resort or cabin in nature	**15%**	133
Guided tours	**19%**	118
○ Wildlife or nature tours	**12%**	138
○ Helicopter or float plane tours	**6%**	125
Winter-based sports	**13%**	141
○ Snowboarding or downhill skiing	**7%**	130
○ Snowshoeing or cross-country skiing	**2%**	127
Casual sports	**13%**	130
○ Casual biking	**4%**	113
○ Fishing	**6%**	137
Water-based sports	**8%**	119
High-intensity sports	**6%**	154
Cultural experiences or attractions	**49%**	73
Local cuisine	**42%**	45
Health and wellness	**31%**	99
Shopping	**25%**	56
Festivals and events	**18%**	76

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	**50%**	76	**51%**	84
To check off dream travel places	**47%**	105	**52%**	104
To escape from routine	**38%**	99	**40%**	107
To spend time with family	**15%**	74	**21%**	93
For adventure and excitement	**44%**	148	**26%**	126
To have memories from top travel spots	**23%**	128	**16%**	101
To have fun with friends	**2%**	80	**5%**	89
To learn through other cultures	**25%**	103	**49%**	114
For personal reflection and growth	**16%**	106	**19%**	118

EXTERNAL TRIP TRIGGERS

	SCORE	**INDEX**	**SCORE**	**INDEX**
Partner / spouse wanted to go	**38%**	96	**40%**	92
Family / friends wanted to go	**32%**	89	**28%**	84
Festival or event	**36%**	91	**30%**	91
Kids wanted to go	**24%**	98	**11%**	95
Visiting friends / family	**21%**	91	**14%**	80
Special event (e.g., wedding, reunion)	**26%**	102	**17%**	79

12% 100 INDEX SCORE

Travel aligns with children's school schedule

17% 104 INDEX SCORE

Take time off for vacation during major holidays

24% 105 INDEX SCORE

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

OUTDOOR EXPLORERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We generally book trip elements about two months in advance, but start researching more in advance for longer distance trips.

61%

Primary Trip Planner

126
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	
	4 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 4.3 months** - Travel guidebooks
Started Researching and Planning – 2.6 months - Travel provider websites **Booked Accommodation – 2 months** - Travel booking sites / apps **Booked Transportation – 1.9 months** - Travel booking sites / apps **Booked Activities – 1.9 months** - Travel booking sites / apps	**3 MONTHS** BEFORE MY TRIP	**Booked Transportation – 2.4 months** - Through a travel agent **Booked Accommodation – 2.3 months** - Travel booking sites / apps **Booked Activities – 2 months** - Travel booking sites / apps
	2 MONTHS BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

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

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

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

% OF TOTAL TRIPS: 8% — 105 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Mountain Retreat		
COMPANIONS	Couple only	28%	
	Alone	24%	
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Escape & Relax
ACTIVITIES	See or explore mountains	55%	
	Nature walks	40%	
	Outdoor hot tub or bath	25%	
KEY BEHAVIOURS	A bucket list destination known for outdoor landscapes and experiences		

% OF TOTAL TRIPS: 6% — 95 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Adventure Destination		
COMPANIONS	Couple only	43%	
	Alone	26%	
TRIP EMOTIONAL MOTIVATIONS	Adventure	Fun	Security
ACTIVITIES	Nature walks	20%	
	Cultural or traditional festivals	11%	
	Visiting famous shopping centres	10%	
KEY BEHAVIOURS	Finding adventure through some sport, but also in cultural festivals and events		

% OF TOTAL TRIPS: 8% — 108 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○ (3 of 5)

TRIP TYPE	Cultural Experience		
COMPANIONS	Alone	29%	
	Couple only	24%	
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Simplicity	Escape & Relax
ACTIVITIES	Souvenir shopping	53%	
	Local restaurants	40%	
	Historical or archeological sites	40%	
KEY BEHAVIOURS	Exploring with a little more structure, and it may be a solo trip and require some more comfort and security		

% OF TOTAL TRIPS: 38% — 143 INDEX SCORE

SEGMENT ALIGNMENT: ●●○○○ (2 of 5)

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban centre	22%	
	Historical site	20%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Local restaurants	39%	
	Souvenir shopping	37%	
	Historical or archeological sites	26%	
KEY BEHAVIOURS	Quick and easy travel to a simple and relaxing destination		

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

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

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Japan	65%	75
US	7%	116
South Korea	4%	123
Antarctica	2%	154
China	2%	113

	SCORE	INDEX
Australia	1%	90
UK	1%	110
Thailand	1%	107
Guam	1%	145
Italy	1%	93

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	52%	138
Provide access to unique natural wonders	40%	143
Provides opportunities to view wildlife in its natural habitat	27%	153
Provides numerous opportunities for outdoor adventures	25%	155
Has many hidden gems	25%	143
Provides a remote, no-frills experience	18%	147
Offers options for adrenaline seekers	11%	157
Offers an energetic and dynamic cultural scene	10%	134

OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

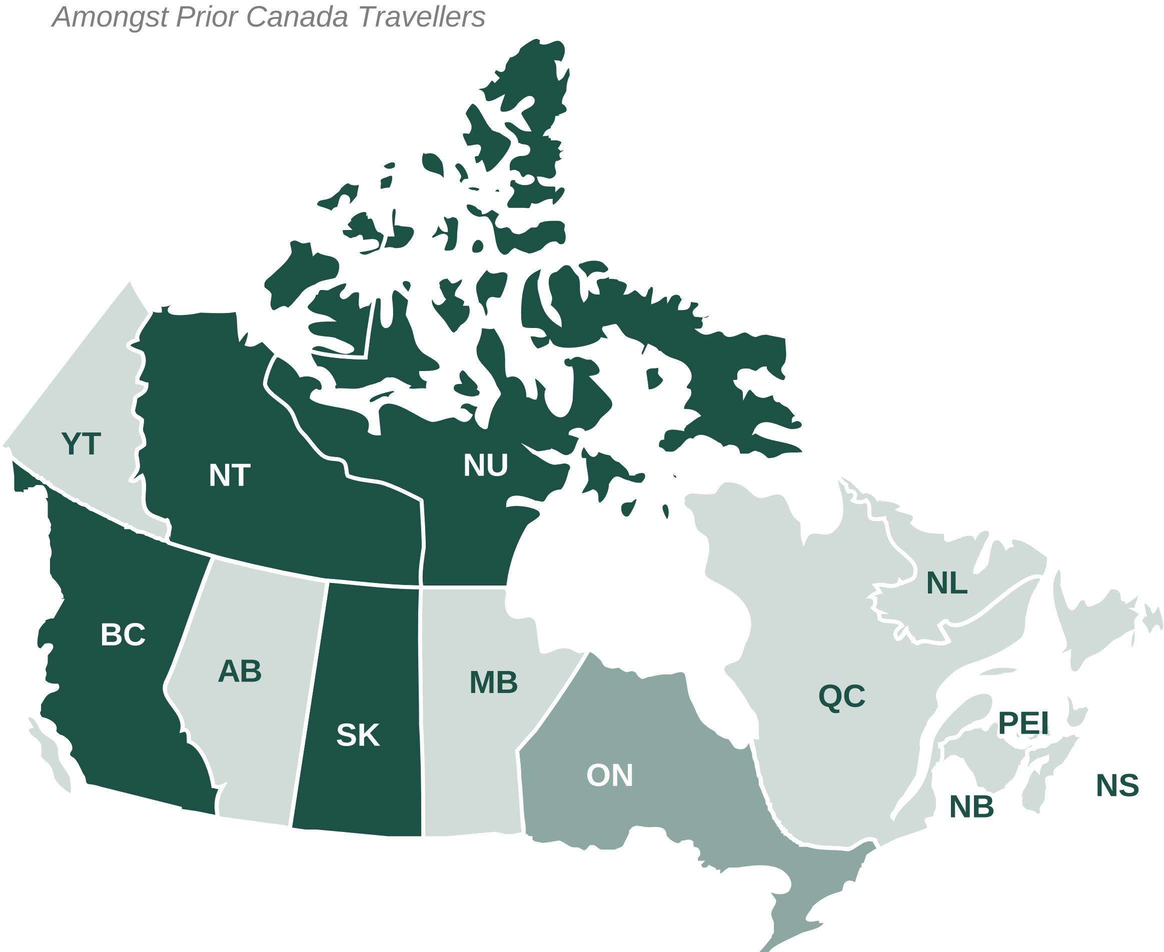
- If we have been to Canada before, it is likely been more than once.
- We overindex on propensity to visit most regions in Canada.
- Future trips to Canada may include Toronto or Quebec. We also think about specific attractions like Niagara Falls or the Rockies.

WHERE DO WE WANT TO GO IN CANADA

VANCOUVER OTTAWA QUEBEC
CANADIAN ROCKIES NOTRE DAME CATHEDRAL
TORONTO BANFF
CALGARY LAKE LOUISE
YELLOWKNIFE NIAGARA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	15%	97
BC	37%	130
MB	0%	80
NB	4%	105
NL	0%	78
NS	2%	97
NT	15%	136
NU	3%	129
ON	39%	124
PEI	6%	95
QC	33%	90
SK	9%	130
YT	5%	108

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Our travel to Canada to date has been during summer and fall months.
- We have researched some destinations in Canada.
- Our knowledge of Canada is average, some of us have done research thinking about future trips.

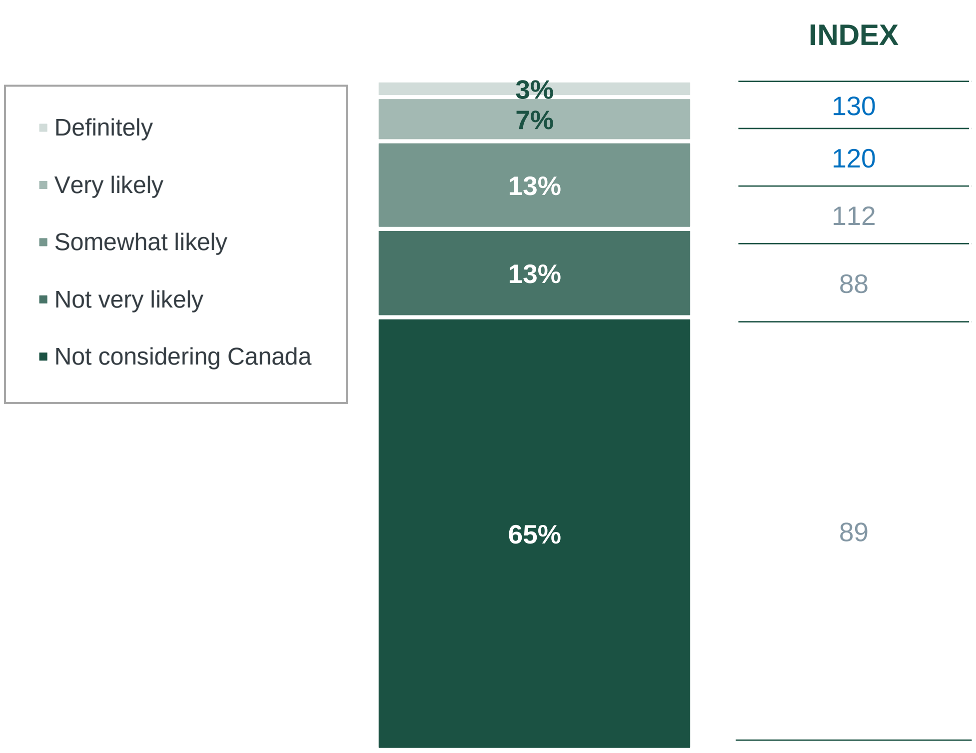
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	**19%**	**22%**	**29%**	**38%**
VS. TOTAL MARKET	18%	25%	37%	28%

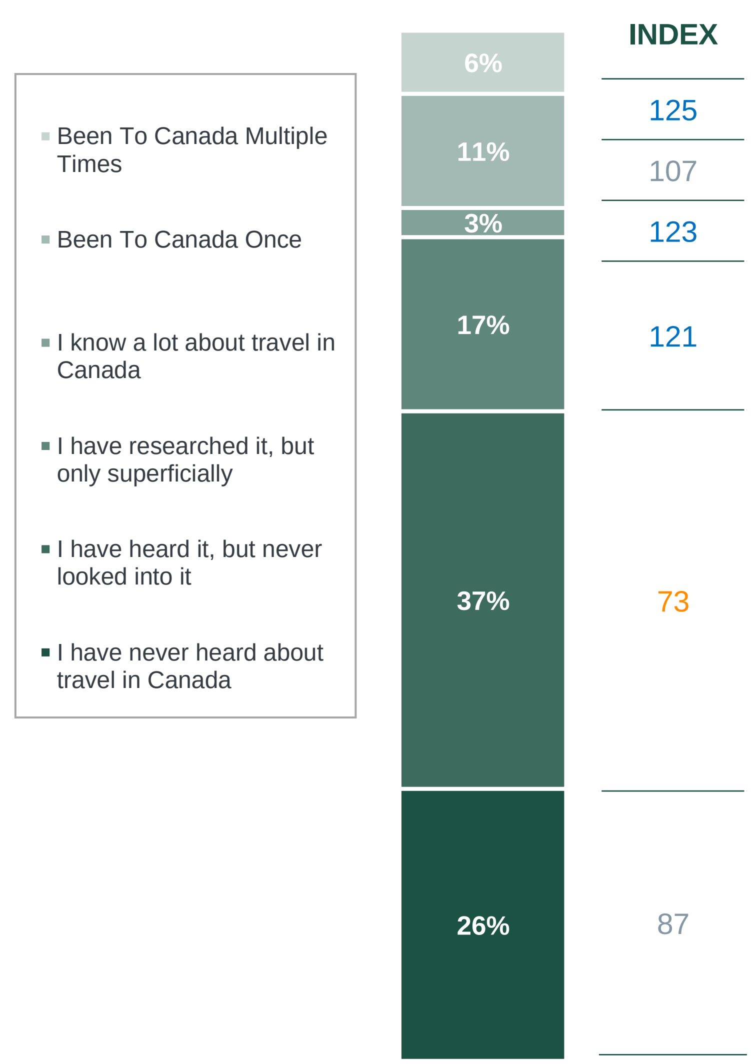
5% Been to Canada in last 5 years

104 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Recent life events have included a city or career move, and a large purchase like a vehicle.
- Beyond travel, our extra income is spent on personal care and continuing to grow our savings.

MAJOR LIFE EVENTS IN LAST 5 YEARS

3%
Had a child
97 INDEX SCORE

15%
Started a new job / career
108 INDEX SCORE

5%
Bought a new home
94 INDEX SCORE

15%
Moved to a new city
115 INDEX SCORE

10%
Child started school
98 INDEX SCORE

35%
Purchased a car
102 INDEX SCORE

10%
Retired
109 INDEX SCORE

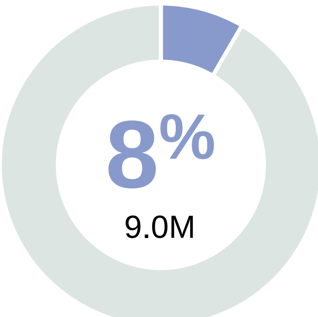
19%
Renovated house
93 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	65%	110
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	56%	106
Savings and investments	46%	101
Personal care and wellness	45%	79
Fashion and accessories	22%	81
Experiences (e.g., concerts, events).	21%	113

CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN POPULATION

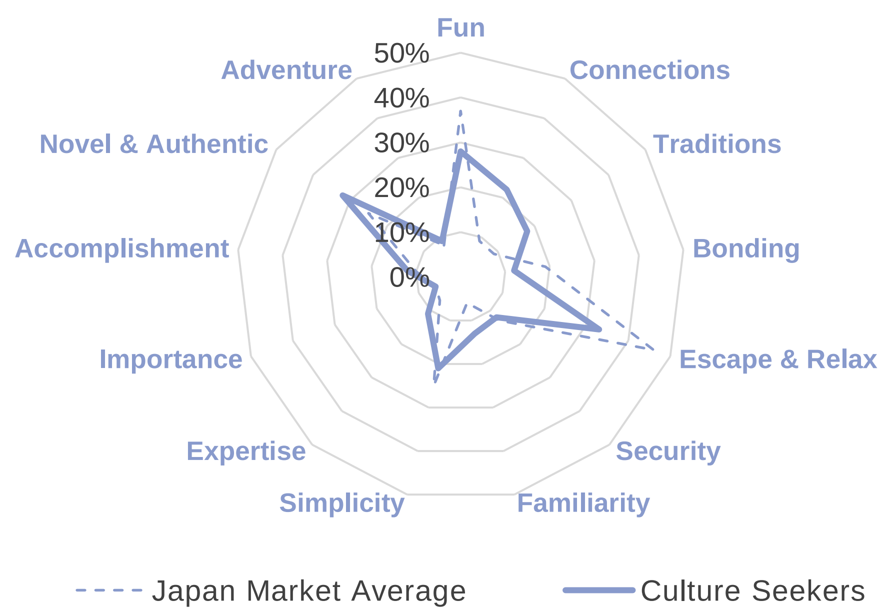
We are sociable, free-spirited individuals who seek unique, authentic experiences. We thrive on immersing ourselves in new perspectives, local culture, making connections, which boosts our energy and confidence.

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

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize diversity, inclusion, sustainability and supporting the local economy.
2. We like the challenge of a new experience, and are not afraid of trying something different like unconventional accommodations.
3. We try to learn the basics of the language before we travel so we can connect with new people and learn something new.
4. Though we like a bustling culture, we also seek destinations with a small town vibe where we can find moments of calm.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

132

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

108

How is this calculated?

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

CULTURE SEEKERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We seek new places and perspectives, and value connecting with locals.
- Staying flexible and being open to spontaneous experiences is how we get the most out of travel.
- We select destinations that are unique, open, and sociable, which aligns with our desire to explore.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	76%	123
Exploring the world through travel is an important milestone of growing up	73%	125
I try to keep a strict budget when I go on holiday	70%	130
I don't generally seek out luxury experiences while travelling	66%	110
I learn the basics of a language before visiting a country / region	61%	125
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	61%	123
Generally I'm not influenced by what destinations are popular or trendy at the moment	54%	119
When I travel to natural environments it makes me reflect on how fortunate I am	46%	125
I go where I want to go, no matter the hurdles	45%	116
I'm open to unconventional accommodations when travelling	44%	125
I seek out destinations that offer quiet opportunities for deep self-reflection	42%	115
I seek out destinations where I can explore my ancestral heritage	30%	122
I like to keep my travel plans flexible and often book on short notice	22%	128

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	48%	118
To open my mind to new perspectives	28%	136
To feel connected with new people	22%	145
To have a fun, social setting	21%	135
To create new, or take part in old, traditions	18%	142
To feel like a local	18%	151

DESIRED DESTINATION

	SCORE	INDEX
Open	38%	138
Friendly	29%	143
Accepting	27%	149
Unique	25%	132
Passionate	10%	121
Sociable	8%	130

CULTURE SEEKERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

AGE

	SCORE	INDEX
18-34	**20%**	104
35-54	**26%**	93
55+	**54%**	105
MEAN YEARS	**53.7**	104

HH INCOME (CAD)

	SCORE	INDEX
$45K or less	**21%**	99
>$45K to $100K	**67%**	108
More than $100K	**9%**	101
Refused	**3%**	79

EMPLOYMENT

	SCORE	INDEX
Employed FT	**40%**	101
Employed PT	**11%**	80
Self-employed / Business owner	**14%**	140
Retired	**14%**	105

EDUCATION

	SCORE	INDEX
Primary education or less	**1%**	90
Secondary education	**21%**	80
Post-secondary education	**78%**	123

80%
118 Have a valid passport

GENDER

63% 137 Male

37% 62 Female

1% 140 Non-binary / Other

HOUSEHOLD

16% 97 Children <18 Living At Home*

19% 102 Children 18+ Living At Home*

23% 97 Children NOT Living At Home*

62% 105 No Children

** Option is not exclusive*

JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	**16%**	113
Kanagawa	**11%**	125
Aichi	**10%**	141
Osaka	**7%**	64
Saitama	**5%**	96
Chiba	**5%**	94

	SCORE	INDEX
Hokkaido	**4%**	98
Hyogo	**4%**	67
Fukuoka	**3%**	89
Mie	**3%**	138
Hiroshima	**3%**	119

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

97

TRAVEL TRADE INDEX: **GROUP**

92

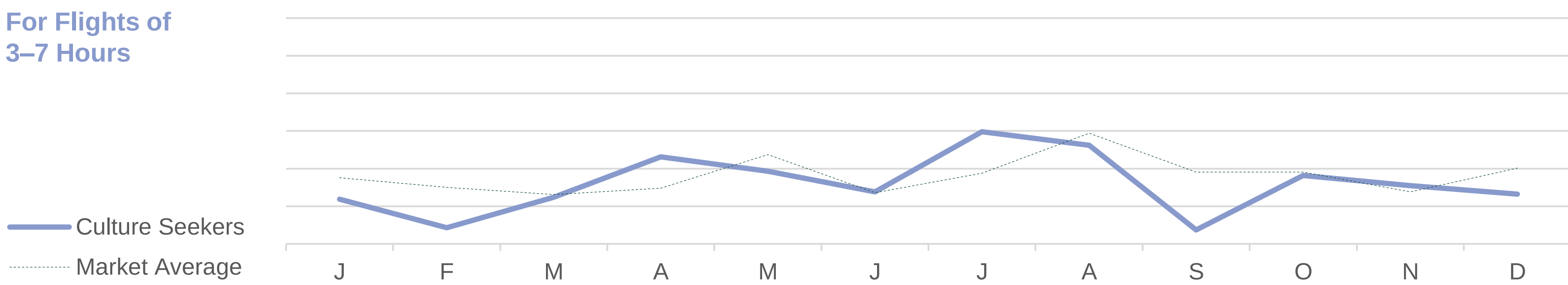
KEY terminology on this page

- **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

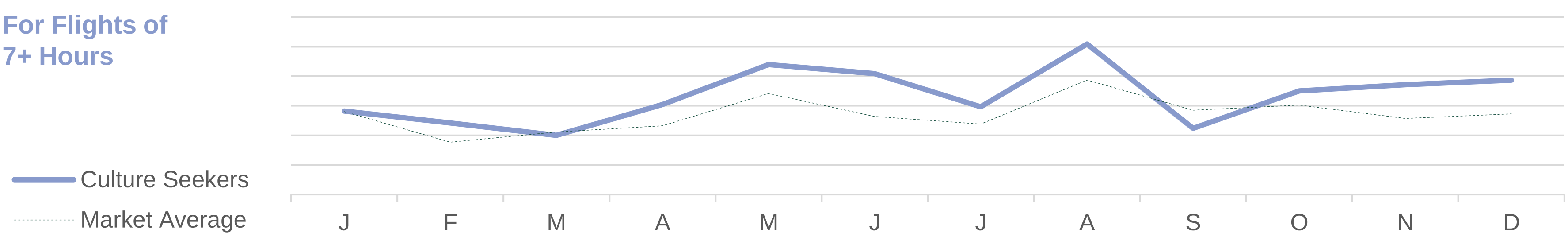
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

	%	INDEX
1-2 Days	42%	93
3-5 Days	20%	112
1 Week Holiday	5%	118
2 Weeks Holiday	2%	119
3 Weeks Or More	1%	134

Incidence is frequency of 2+ times per year

TRIP TYPE

	%	INDEX
Domestic Leisure	48%	98
International Leisure	8%	117
Business Trip	16%	133
Added Personal To Business	7%	128
Worked During Vacation	4%	142

Incidence is frequency of 2+ times per year

CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**74%**	95
Budget Hotel	**27%**	94
Premium Hotel	**17%**	92
Friend's or family's place	**12%**	126
Bed & Breakfast	**8%**	119
Hostel	**5%**	137

THOUGHTS ON INDIGENOUS TRAVEL

62%

131 INDEX SCORE

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

10%

116 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	**90%**	132
You only ever get to know a country by experiencing its culture	**60%**	132
I'm willing to put in the effort while travelling in order to see lesser-known places	**53%**	124
I'm open to travelling to destinations with limited tourist infrastructure	**45%**	130
I like to explore places that are off the beaten path and less explored	**37%**	118
I'm open to visiting destinations with challenging climates or weather conditions	**29%**	116

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We are frequent solo travellers, and also travel with our partner.
- Our budgets are usually mid-ranged, but can splurge on an experience.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	41%	81
Solo	34%	138
Adult relatives	17%	73
Friends	11%	96
Kids	10%	96

BUDGET

AVERAGE SPEND (ALL TRIPS)

$1,520

92
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	71%	134
It's important to me that I visit somewhere that is open to diversity and inclusion	69%	137
Hearing from underrepresented communities is an important part of travelling	55%	132
I consider the impact that I personally have on the destinations I visit	54%	133
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	45%	127

43%

PRIORITIZE SUSTAINABLE TRAVEL

135 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 to engage with cultural attractions and explore history and heritage.
- We also explore and immerse in the destinations through food and local festivals.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	**70%**	119
○ Historical or archeological sites	**51%**	107
○ Museums	**36%**	128
○ Observing architecture	**34%**	114
Local cuisine	**69%**	101
○ Local restaurants	**52%**	100
○ Street cuisine	**29%**	109
Festivals and events	**39%**	130
○ Cultural or traditional festivals	**26%**	138
○ Music concerts or festivals	**20%**	124
Casual sports	**12%**	122
○ Casual biking	**4%**	114
○ Fishing	**5%**	116
Nightlife	**9%**	122
○ Bars and pubs	**5%**	113
○ Casinos	**3%**	142
Shopping	**42%**	90
Overnight experiences	**26%**	101
Nature experiences	**22%**	83
Health and wellness	**20%**	60
Guided tours	**18%**	113
Family-focused attractions	**17%**	89
Winter-based sports	**6%**	97

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 check off dream travel places	39%	86	45%	79
To relax and unwind	54%	83	47%	78
To escape from routine	23%	67	42%	112
To spend time with family	33%	102	18%	90
To have memories from top travel spots	10%	89	15%	99
To have fun with friends	3%	82	8%	95
To learn through other cultures	28%	110	48%	113
To seek solitude and isolation	29%	142	13%	121
For adventure and excitement	15%	91	23%	117

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Festival or event	43%	103	46%	117
Partner / spouse wanted to go	31%	86	37%	88
Family / friends wanted to go	17%	68	33%	91
Visiting friends / family	42%	134	48%	134
Special event (e.g., wedding, reunion)	26%	102	27%	119
Kids wanted to go	13%	91	11%	95

9% 95 INDEX SCORE

Travel aligns with children's school schedule

18% 107 INDEX SCORE

Take time off for vacation during major holidays

22% 97 INDEX SCORE

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

CULTURE SEEKERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We plan for long distance trips, researching well in advance. For shorter distance trips, we are booking planning and booking a couple months before.

63%

Primary Trip Planner

132
INDEX SCORE

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

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

FLIGHT OF 3–7 HOURS		FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 5.1 months** ○ Official tourism websites
	5 MONTHS BEFORE MY TRIP	
	4 MONTHS BEFORE MY TRIP	**Booked Transportation – 3 months** ○ Travel booking sites / apps **Booked Accommodation – 2.5 months** ○ Travel booking sites / apps
Started Researching and Planning – 2.2 months ○ Official tourism websites	**3 MONTHS** BEFORE MY TRIP	
Booked Transportation – 1.6 months ○ Travel booking sites / apps **Booked Accommodation – 1.6 months** ○ Travel booking sites / apps **Booked Activities – 1.4 months** ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 1.7 months** ○ No need to book
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips enjoy the culture, food, music, and shopping of a destination.
- We also take trips as a couple or with extended family 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: 34% — 136 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		**27%**
	Historical site		**18%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants		**36%**
	Souvenir shopping		**29%**
	Cafes or bakeries		**16%**
KEY BEHAVIOURS	Budget accommodations, spending on food experiences, may be visiting friends		

% OF TOTAL TRIPS: 12% — 120 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Cultural Experience		
COMPANIONS	Alone		**29%**
	Couple only		**24%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Simplicity	Escape & Relax
ACTIVITIES	Souvenir shopping		**53%**
	Historical or archeological sites		**40%**
	Religious buildings or sites		**21%**
KEY BEHAVIOURS	Focussed on personal growth and exploring with an open mind. Spending more		

% OF TOTAL TRIPS: 28% — 123 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban centre		**22%**
	Historical site		**20%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Local restaurants		**39%**
	Souvenir shopping		**37%**
	Historical or archeological sites		**26%**
KEY BEHAVIOURS	Planning less than a month before travel. Destination selected for cultural attraction		

% OF TOTAL TRIPS: 11% — 117 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		**41%**
	Extended family		**25%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Souvenir shopping		**36%**
	Outdoor hot tub or bath		**33%**
	Local restaurants		**30%**
KEY BEHAVIOURS	Easy and affordable trip to a familiar destination to just relax with family		

CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

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

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Japan	**70%**	87
US	**5%**	86
China	**3%**	151
Australia	**2%**	110
Italy	**2%**	132

	SCORE	INDEX
Hong Kong	**2%**	135
South Korea	**2%**	89
France	**2%**	140
UK	**2%**	124
Singapore	**2%**	112

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**49%**	123
Has a variety of museums and / or historical sites	**41%**	130
Provides a variety of local festivals and events	**25%**	146
Is inclusive and tolerant	**24%**	139
Has many hidden gems	**21%**	127
Has a small town feel	**18%**	129
Provides a bustling and vibrant city vibe	**16%**	128
Has a thriving arts and music scene	**16%**	147

CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

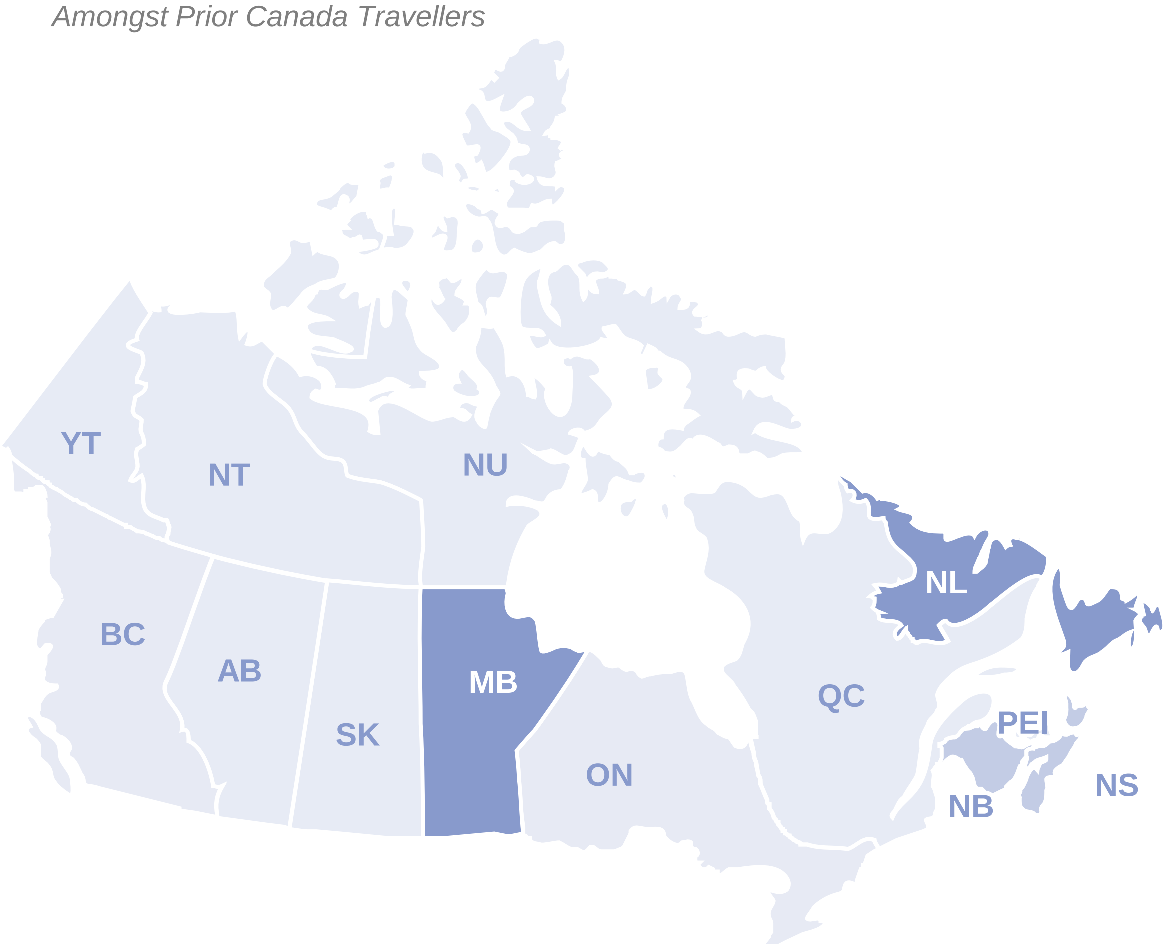
- We are more likely to have visited Canada than other segments in Japan.
- Our visits have focused on Quebec and British Columbia.
- A future visit could include Toronto, Niagara, or Quebec.

WHERE DO WE WANT TO GO IN CANADA

QUEBEC
OTTAWA
NIAGARA
NOTRE DAME CATHEDRAL
PRINCE EDWARD ISLAND
TORONTO
LAKE LOUISE
CANADIAN ROCKIES
BANFF
NEWFOUNDLAND AND LABRADOR
VANCOUVER
VICTORIA
MONTREAL

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	16%	101
BC	25%	97
MB	5%	146
NB	5%	123
NL	10%	136
NS	4%	123
NT	8%	104
NU	2%	113
ON	28%	82
PEI	5%	93
QC	38%	108
SK	4%	103
YT	5%	114

CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Travel to date in Canada has spanned most seasons.
- Overall, our knowledge of Canada as a travel destination has an opportunity to grow.

CANADA TRAVEL MONTHS ON A PAST TRIP

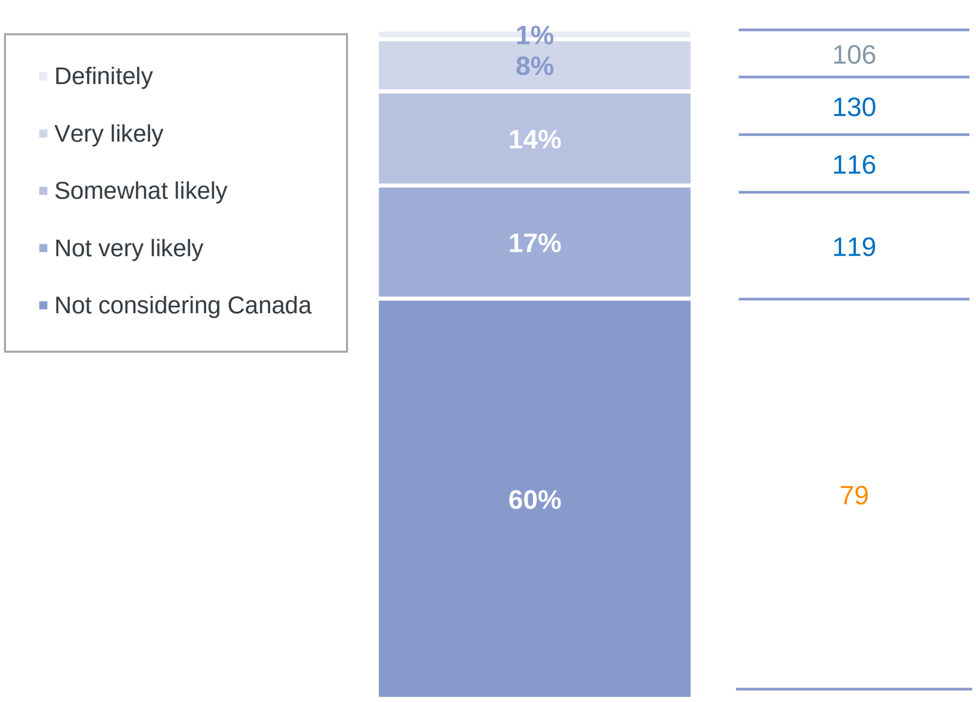
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CULTURE SEEKERS	**23%**	**18%**	**38%**	**27%**
VS. TOTAL MARKET	18%	25%	37%	28%

8%

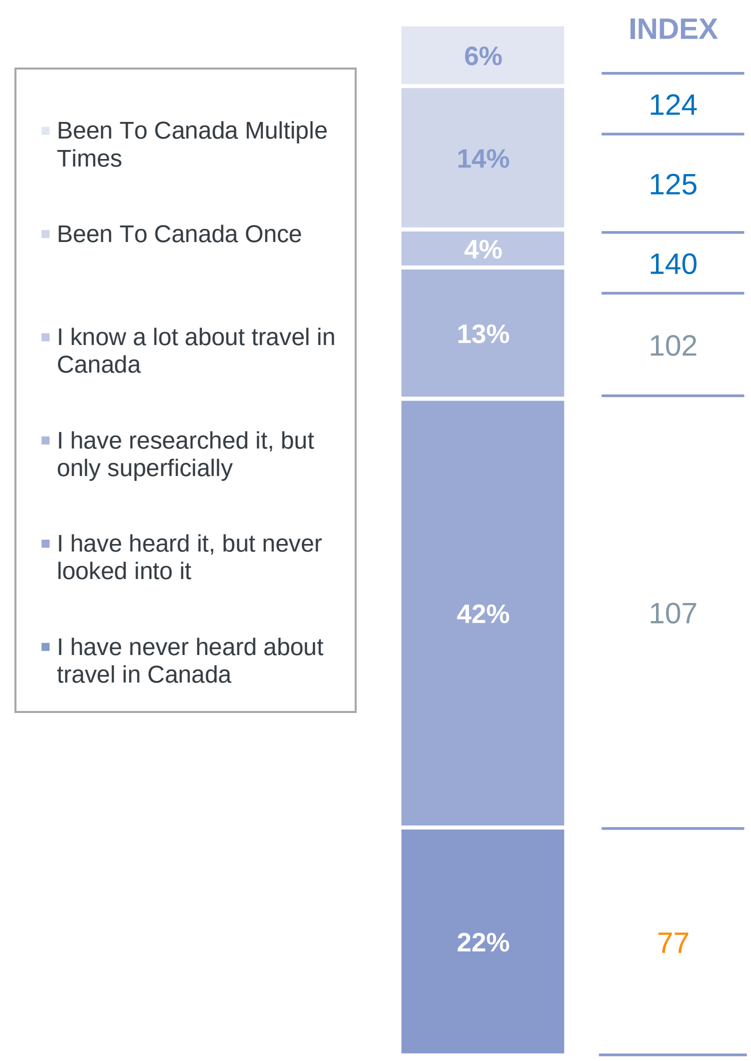
Been to Canada in last 5 years

128 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 our hobbies.
- In the last 5 years, we have purchased a new car and invested in home renovations.

MAJOR LIFE EVENTS IN LAST 5 YEARS

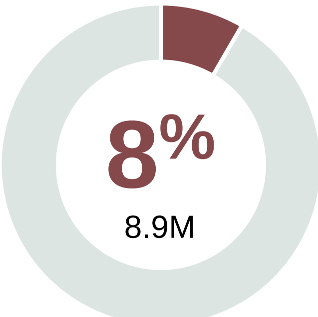
%	Event	Index score
1%	Had a child	94 INDEX SCORE
14%	Started a new job / career	104 INDEX SCORE
5%	Bought a new home	92 INDEX SCORE
12%	Moved to a new city	96 INDEX SCORE
9%	Child started school	96 INDEX SCORE
31%	Purchased a car	92 INDEX SCORE
11%	Retired	119 INDEX SCORE
26%	Renovated house	113 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**62%**	102
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	**59%**	116
Savings and investments	**48%**	109
Personal care and wellness	**42%**	70
Technology and gadgets	**23%**	129
Fashion and accessories	**22%**	80

REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN POPULATION

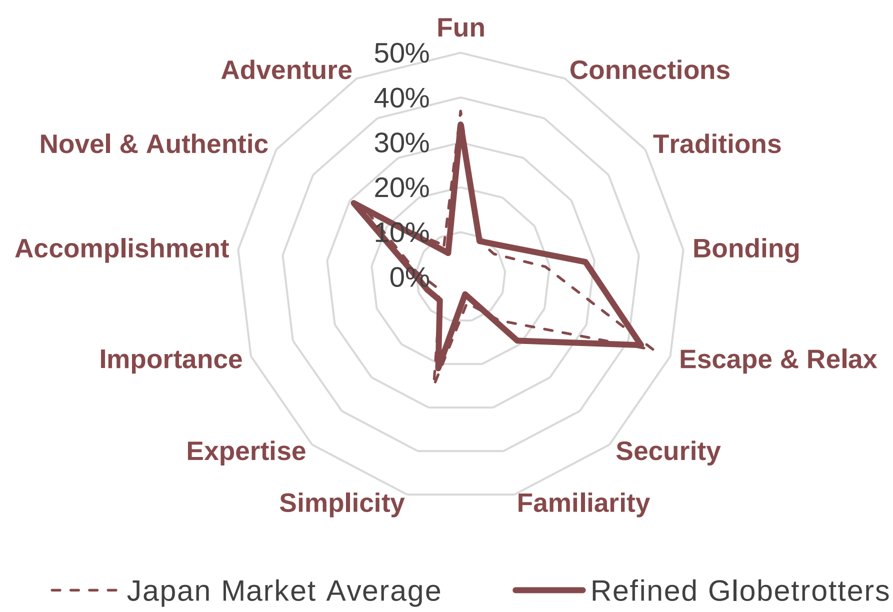
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross off our list.

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

WHAT YOU NEED TO KNOW ABOUT ME

1. Travel is our #1 spending priority.
2. We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.
3. Planning how we will see all the history, museums, and architecture of a destination is paramount.
4. Selecting well-known attractions and experiences ensures we will feel welcome and can be confident in the quality and safety.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

115

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

141

How is this calculated?

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

REFINED GLOBETROTTERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We seek discovery through experiences, and want to experience luxury and indulge in world-class experiences.
- Feeling welcomed and confident that our destinations are safe and reliable are a needed comfort.
- Joining tours and working with travel agents ensures a smooth, enlightening travel experience.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm passionate about travelling	98%	143
I'm always on the look out for new destinations to visit next	93%	126
I like to come back from travels having learnt something new	76%	123
While I think about value for money, it doesn't tend to influence my choice of destination	71%	133
Luxury experiences are an important part of travel	70%	150
I am more likely to select destinations / activities that invest in socially responsible tourism	69%	141
When there's a lot of positive buzz about a destination it makes me want to visit it more	65%	127
I make sure to visit the "famous" sites wherever I go	64%	138
I seek travel advice from travel agencies and agents	49%	148
I tend to not think about my budget too much when travelling	45%	141
I enjoy joining guided tours to explore new destinations	43%	147
I seek out fine dining experiences and gourmet cuisine when I travel	34%	154
When traveling, I expect 24 / 7 support from a travel provider	34%	137

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	49%	122
To share quality time with others	35%	137
To feel safe and secure	24%	130
To bond through shared experiences	22%	118
To feel welcomed	13%	140
To create new, or take part in old, traditions	12%	115

DESIRED DESTINATION

	SCORE	INDEX
Safe	62%	113
Reliable	52%	121
Luxurious	43%	151
Authentic	30%	146
Exclusive	25%	156
World-Class	18%	155

REFINED GLOBETROTTERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- Many of us are employed full time, and some of us are retired.
- If we are not working for an employer, we are working full time to maintain our home.
- We have medium to high incomes or net worth.

AGE

	SCORE	INDEX
18-34	13%	74
35-54	22%	88
55+	66%	118
MEAN YEARS	57.9	121

HH INCOME (CAD)

	SCORE	INDEX
$45K or less	10%	53
>$45K to $100K	70%	131
More than $100K	16%	147
Refused	4%	107

EMPLOYMENT

	SCORE	INDEX
Employed FT	34%	90
Employed PT	10%	69
Self-employed / Business owner	8%	90
Retired	17%	117

EDUCATION

	SCORE	INDEX
Primary education or less	1%	85
Secondary education	27%	101
Post-secondary education	73%	102

87%
134 Have a valid passport

GENDER

44% 86 Male

56% 114 Female

0% 80 Non-binary / Other

HOUSEHOLD

11% 94 Children <18 Living At Home*

22% 115 Children 18+ Living At Home*

34% 124 Children NOT Living At Home*

55% 99 No Children

** Option is not exclusive*

JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	20%	136
Osaka	10%	129
Aichi	9%	119
Kanagawa	8%	87
Saitama	6%	110
Chiba	5%	106

	SCORE	INDEX
Hyogo	5%	100
Kyoto	3%	115
Hokkaido	3%	81
Shizuoka	3%	95
Nara	3%	136

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

126

TRAVEL TRADE INDEX: **GROUP**

128

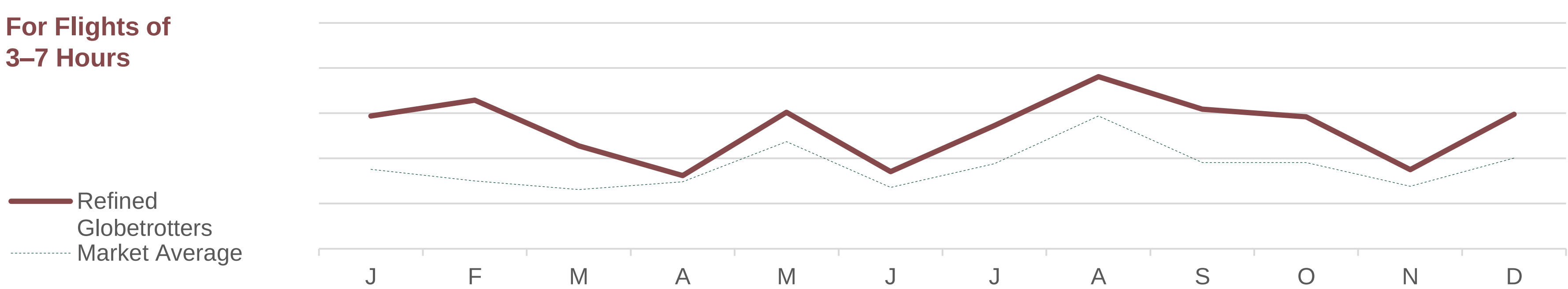
KEY terminology on this page

- **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

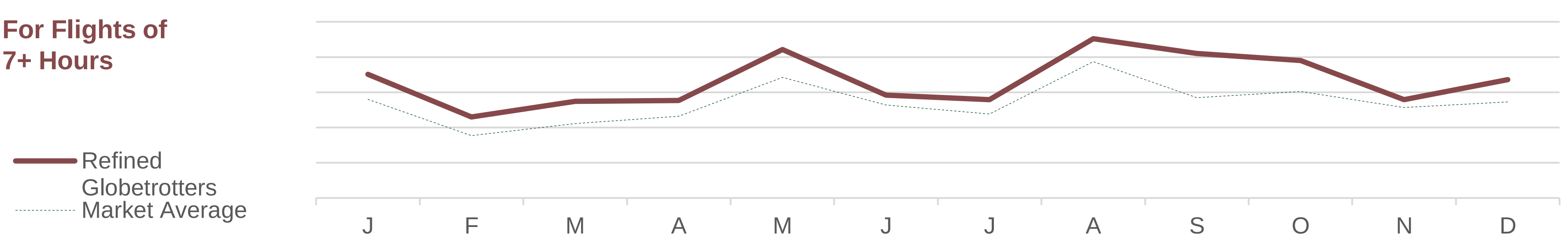
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	53%	133
3-5 Days	28%	138
1 Week Holiday	6%	132
2 Weeks Holiday	3%	143
3 Weeks Or More	1%	134

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	62%	141
International Leisure	11%	134
Business Trip	12%	112
Added Personal To Business	7%	130
Worked During Vacation	3%	116

Incidence is frequency of 2+ times per year

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	68%	64
Premium Hotel	46%	149
High-end / Luxury Hotel	14%	152
Budget Hotel	10%	62
Friend's or family's place	8%	81
All-inclusive resort	5%	148

THOUGHTS ON INDIGENOUS TRAVEL

46%

109 INDEX SCORE

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

11%

119 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	85%	123
You only ever get to know a country by experiencing its culture	57%	126
I'm willing to put in the effort while travelling in order to see lesser-known places	36%	100
I'm open to visiting destinations with challenging climates or weather conditions	25%	106
I'm open to travelling to destinations with limited tourist infrastructure	25%	90
I like to explore places that are off the beaten path and less explored	19%	90

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	65%	114
Adult relatives	25%	115
Friends	10%	92
Kids	10%	96
Solo	9%	79

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,380

127
INDEX SCORE

SPEND STYLE

Premium to High-end Luxury

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	62%	115
It's important to me that I visit somewhere that is open to diversity and inclusion	54%	115
I consider the impact that I personally have on the destinations I visit	40%	108
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	39%	114
Hearing from underrepresented communities is an important part of travelling	38%	106

33%

PRIORITIZE SUSTAINABLE TRAVEL

113 INDEX SCORE

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

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

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Local and luxury in both cuisine and shopping are a priority.
- We like to explore historical sites and local culture, through guided tours or train trips.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	79%	121
○ Local restaurants	61%	120
○ Luxury dining	36%	149
○ Cafes or bakeries	29%	113
Cultural experiences or attractions	74%	129
○ Historical or archeological sites	62%	130
○ Observing architecture	38%	127
Overnight experiences	36%	134
○ Train trip	18%	126
○ Staying at resort or cabin in nature	12%	120
Guided tours	24%	138
○ City tours	14%	137
○ Food tours	12%	146
Nightlife	8%	116
○ Bars and pubs	5%	114
○ Clubs and dancing	2%	131
Shopping	47%	100
Nature experiences	36%	108
Health and wellness	30%	95
Family-focused attractions	26%	97
Festivals and events	22%	86
Casual sports	8%	99
Water-based sports	6%	107

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	**73%**	114	**64%**	104
To check off dream travel places	**48%**	106	**57%**	123
To spend time with family	**37%**	109	**34%**	105
To escape from routine	**34%**	90	**27%**	80
To have memories from top travel spots	**16%**	109	**17%**	103
To learn through other cultures	**33%**	119	**38%**	100
To have fun with friends	**7%**	94	**10%**	100
To be pampered	**13%**	131	**11%**	124
For adventure and excitement	**13%**	87	**10%**	78

EXTERNAL TRIP TRIGGERS

	SCORE	**INDEX**	**SCORE**	**INDEX**
Partner / spouse wanted to go	**53%**	116	**49%**	103
Family / friends wanted to go	**49%**	114	**45%**	106
Festival or event	**43%**	103	**35%**	100
Visiting friends / family	**23%**	95	**25%**	97
Kids wanted to go	**26%**	100	**18%**	100
Special event (e.g., wedding, reunion)	**24%**	98	**24%**	108

11% 98 INDEX SCORE

Travel aligns with children's school schedule

20% 112 INDEX SCORE

Take time off for vacation during major holidays

16% 74 INDEX SCORE

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

REFINED GLOBETROTTERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- For longer distance trips we book key elements nearly three months in advance, and use a variety of online resources.

50%

Primary Trip Planner

98
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 – 4.2 months** ○ Travel review sites ○ Travel agents / advisors
Started Researching and Planning – 2.8 months ○ Official tourism websites	**3 MONTHS** BEFORE MY TRIP	**Booked Transportation – 2.9 months** ○ Travel booking sites / apps **Booked Accommodation – 2.9 months** ○ Travel booking sites / apps **Booked Activities – 2.3 months** ○ Travel booking sites / apps
Booked Transportation – 2 months ○ Travel booking sites / apps **Booked Accommodation – 1.9 months** ○ Travel booking sites / apps **Booked Activities – 1.6 months** ○ No need to book	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips explore luxury and world renowned destinations.
- We also take trips like Outdoor Explorers.

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

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

% OF TOTAL TRIPS: 9% — 110 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Luxury Resort		
COMPANIONS	Couple only	53%	
	Extended family	36%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Fun
ACTIVITIES	Local restaurants	35%	
	Luxury dining	29%	
	Souvenir shopping	29%	
KEY BEHAVIOURS	Seeking high-end and exclusive experiences. Focussed on relaxation		

% OF TOTAL TRIPS: 23% — 158 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Historical Site		
COMPANIONS	Couple only	50%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Novel & Authentic	Simplicity
ACTIVITIES	Historical or archeological sites	63%	
	Local restaurants	48%	
	Souvenir shopping	46%	
KEY BEHAVIOURS	Crossing a famous attraction off the list. Seeking an authentic but reliable experience		

% OF TOTAL TRIPS: 7% — 101 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Food and Wine Capital		
COMPANIONS	Couple only	50%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants	69%	
	Luxury dining	38%	
	Cooking lessons	26%	
KEY BEHAVIOURS	All about immersing ourselves in culinary experiences, and having fun with family		

% OF TOTAL TRIPS: 8% — 105 INDEX SCORE

SEGMENT ALIGNMENT: ●●○○○

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	44%	
	Alone	33%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Historical or archeological sites	22%	
	Outdoor hot tub or bath	19%	
	Wildlife or nature tours	14%	
KEY BEHAVIOURS	Slightly lower budget, more focus on seeing natural landscapes and rich culture		

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We enjoy exploring well-known and luxury destinations, with access to nature, through curated experiences.
- We travel most frequently to more domestic destinations, and travel internationally at least once a year.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Japan	66%	77
US	7%	118
South Korea	4%	116
Australia	4%	137
Italy	2%	132

	SCORE	INDEX
Singapore	2%	122
UK	2%	128
France	2%	124
Thailand	1%	105
Hong Kong	1%	106

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	54%	132
Has packaged holiday / vacation offers	13%	140
Known for stunning natural landscapes	46%	127
Renowned for food and drink experiences	45%	132
Has a variety of museums and / or historical sites	39%	124
Provide access to unique natural wonders	36%	132
Has luxury dining, shopping, and accommodations	32%	151
Ideal setting for romantic getaways	20%	142

REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

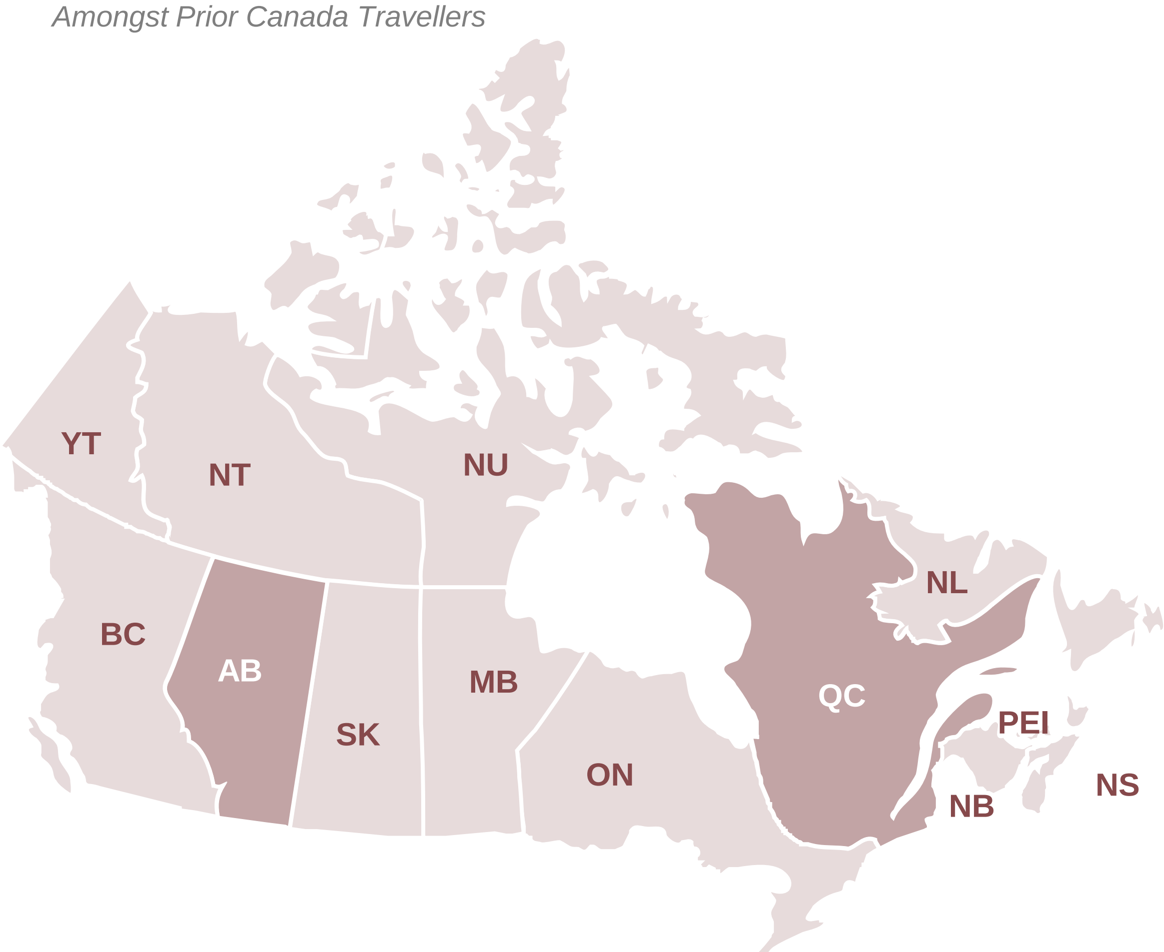
- We may have been to Canada before, but perhaps not recently.
- Overall we have visited a variety of destinations in Canada.
- A future trip to Canada could include Toronto, Niagara Falls, or Vancouver.

WHERE DO WE WANT TO GO IN CANADA

NIAGARA
BANFF
QUEBEC
THE GREAT LAKES
STANLEY PARK
NATIONAL PARK
RIDEAU CANAL
TORONTO
HALIFAX
YUKON
NOTRE DAME CATHEDRAL
PRINCE EDWARD ISLAND
MONTREAL
CANADIAN ROCKIES
VANCOUVER

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	22%	123
BC	20%	82
MB	2%	99
NB	2%	81
NL	3%	94
NS	0%	76
NT	7%	99
NU	0%	73
ON	33%	104
PEI	7%	107
QC	40%	117
SK	0%	82
YT	4%	102

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

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

CANADA TRAVEL MONTHS ON A PAST TRIP

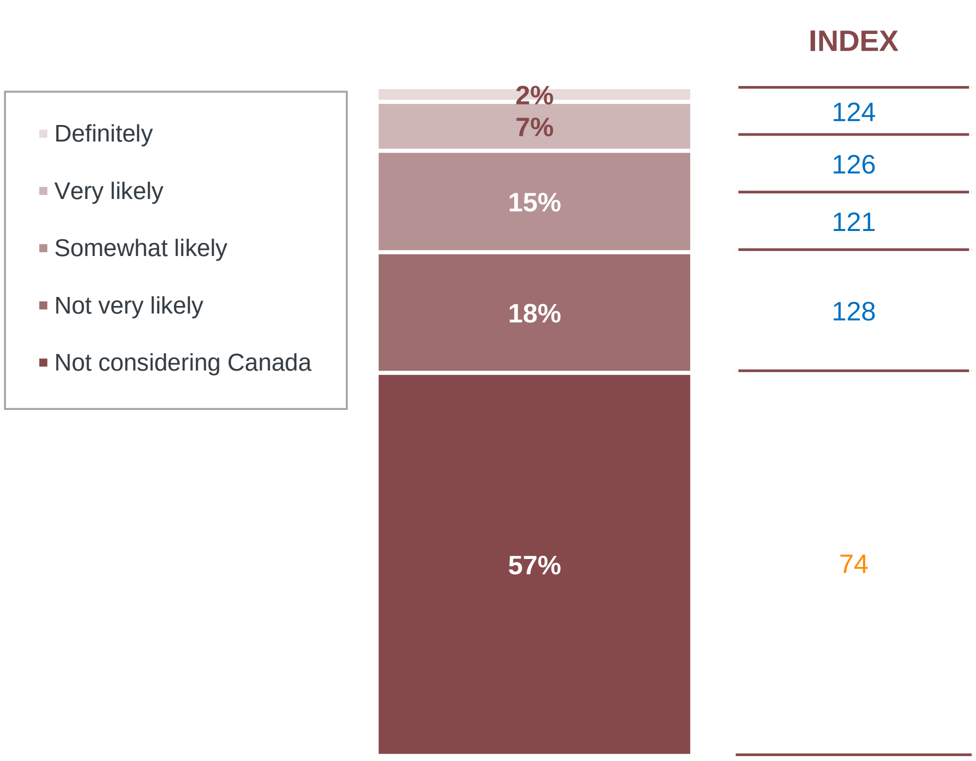
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	**8%**	**26%**	**41%**	**29%**
VS. TOTAL MARKET	18%	25%	37%	28%

6%

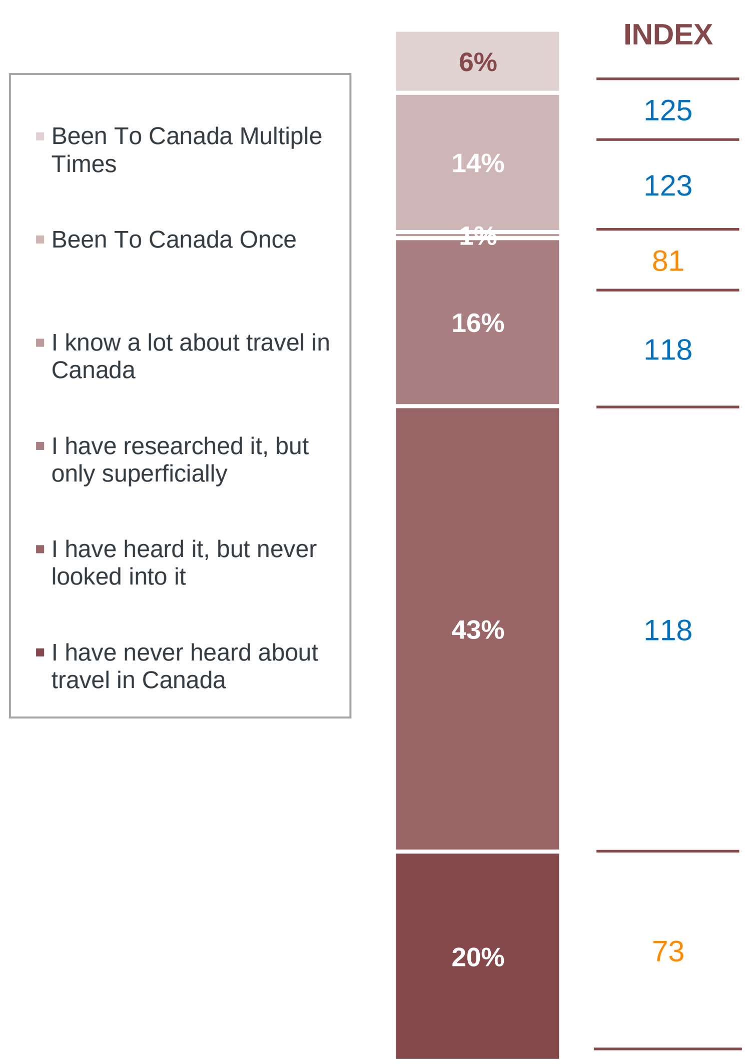
Been to Canada in last 5 years

118 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

2%
Had a child
96 INDEX SCORE

8%
Started a new job / career
70 INDEX SCORE

8%
Bought a new home
106 INDEX SCORE

9%
Moved to a new city
79 INDEX SCORE

7%
Child started school
94 INDEX SCORE

43%
Purchased a car
124 INDEX SCORE

5%
Retired
76 INDEX SCORE

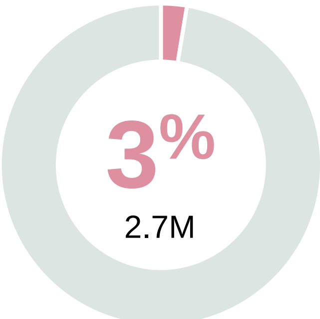
33%
Renovated house
134 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	75%	135
Personal care and wellness	51%	108
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	49%	80
Savings and investments	43%	89
Fashion and accessories	29%	105
Home and decor	17%	100

PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN POPULATION

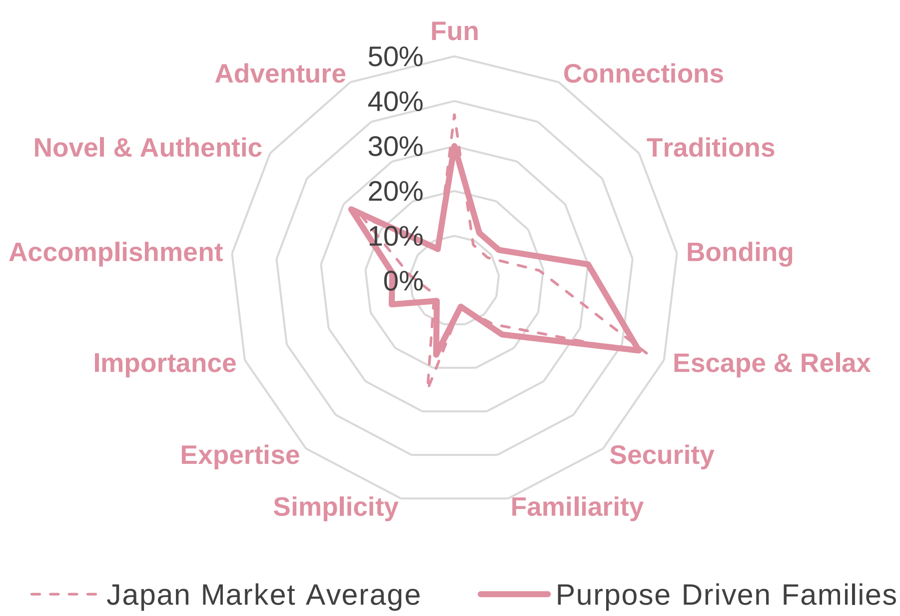
We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish hidden gems that support local cultures, and anywhere that lets us spend time in nature.

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

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize authentic exploration that allows us to discover and learn about the world.
2. Being trendy includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.
3. Staying active and exploring the outdoors or unconventional experiences is an important way learn new things.
4. We are planners and like to know what comes next, and are open to travel agent support as well as digital planners to assist us.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

131

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

132

How is this calculated?

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

PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We value learning, engaging with local cultures, and exploring the history of our destinations.
- We are passionate about travel, and seek authentic destinations that will make our friends say 'wow'.
- We use travel to bond and create memories, and value that we can provide these experiences to our children.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	**77%**	125
Exploring the world through travel is an important milestone of growing up	**74%**	126
I’m a planner, while travelling I like to know what comes next	**68%**	155
When there’s a lot of positive buzz about a destination it makes me want to visit it more	**67%**	131
I learn the basics of a language before visiting a country / region	**61%**	125
Luxury experiences are an important part of travel	**56%**	126
I’d be open to using AI-powered chatbots for travel planning and assistance	**52%**	156
I feel best on vacation when being highly active	**51%**	118
I’m open to unconventional accommodations when travelling	**49%**	135
I prefer to explore quickly and cover as much ground as possible at historic sites or museums	**45%**	125
Even while travelling, I like to maintain regular contact with my duties or obligations back home	**39%**	150
When traveling, I expect 24 / 7 support from a travel provider	**33%**	134
I seek out destinations where I can explore my ancestral heritage	**30%**	123

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	**33%**	131
To bond through shared experiences	**28%**	143
To open my mind to new perspectives	**26%**	131
To have authentic experiences	**26%**	132
To feel like I’m important	**15%**	156
To feel welcomed	**12%**	131

DESIRED DESTINATION

	SCORE	INDEX
Caring	**28%**	150
Friendly	**26%**	129
Unique	**22%**	123
Accepting	**21%**	127
Familiar	**16%**	122
Passionate	**10%**	120

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 medium to high incomes.

AGE

	SCORE	INDEX
18-34	**18%**	94
35-54	**63%**	142
55+	**19%**	65
MEAN YEARS	**46.2**	73

HH INCOME (CAD)

	SCORE	INDEX
$45K or less	**17%**	85
>$45K to $100K	**69%**	122
More than $100K	**11%**	115
Refused	**3%**	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	**65%**	150
Employed PT	**15%**	130
Self-employed / Business owner	**5%**	68
Retired	**1%**	56

EDUCATION

	SCORE	INDEX
Primary education or less	**3%**	148
Secondary education	**14%**	51
Post-secondary education	**83%**	144

73%
103 Have a valid passport

GENDER

62% 134 Male

38% 67 Female

0% 80 Non-binary / Other

HOUSEHOLD

83% 144 Children <18 Living At Home*

8% 56 Children 18+ Living At Home*

8% 62 Children NOT Living At Home*

9% 56 No Children

** Option is not exclusive*

JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	**16%**	108
Osaka	**10%**	136
Kanagawa	**9%**	97
Chiba	**7%**	144
Hokkaido	**6%**	118
Saitama	**6%**	120

	SCORE	INDEX
Shizuoka	**5%**	146
Hyogo	**5%**	100
Aichi	**4%**	69
Kyoto	**4%**	139
Fukuoka	**3%**	100

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

116

TRAVEL TRADE INDEX: **GROUP**

109

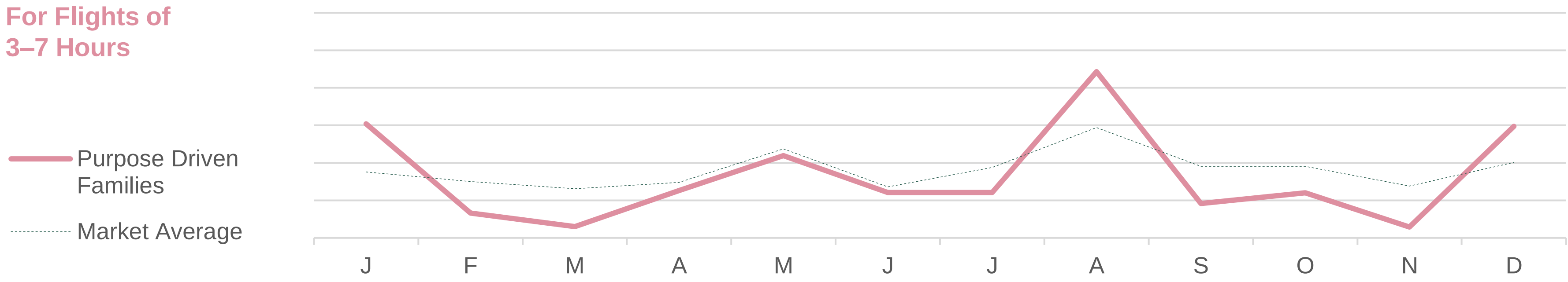
KEY terminology on this page

- **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

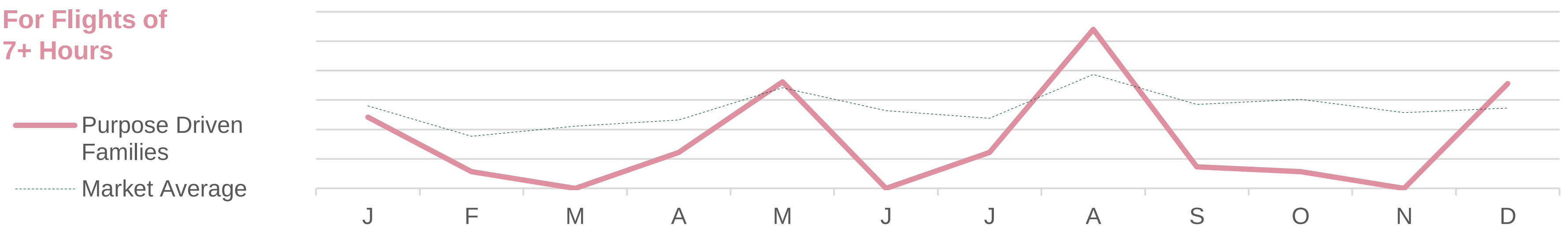
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	52%	130
3-5 Days	20%	111
1 Week Holiday	2%	84
2 Weeks Holiday	2%	116
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	54%	116
International Leisure	7%	109
Business Trip	18%	139
Added Personal To Business	3%	91
Worked During Vacation	2%	107

Incidence is frequency of 2+ times per year

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**69%**	71
Premium Hotel	**31%**	120
Budget Hotel	**13%**	69
Bed & Breakfast	**9%**	130
Campsite	**9%**	159
High-end / Luxury Hotel	**8%**	118

THOUGHTS ON INDIGENOUS TRAVEL

59%

127 INDEX SCORE

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

11%

121 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	**77%**	110
You only ever get to know a country by experiencing its culture	**52%**	117
I'm willing to put in the effort while travelling in order to see lesser-known places	**37%**	102
I like to explore places that are off the beaten path and less explored	**24%**	99
I'm open to travelling to destinations with limited tourist infrastructure	**23%**	88
I'm open to visiting destinations with challenging climates or weather conditions	**23%**	102

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	84%	140
Kids	74%	144
Adult relatives	19%	85
Friends	8%	81
Solo	6%	71

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,750

142
INDEX SCORE

SPEND STYLE

Premium / Upscale

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	71%	133
It's important to me that I visit somewhere that is open to diversity and inclusion	63%	129
Hearing from underrepresented communities is an important part of travelling	59%	137
I consider the impact that I personally have on the destinations I visit	55%	136
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	47%	131

40%

PRIORITIZE SUSTAINABLE TRAVEL

127 INDEX SCORE

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

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

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Family attractions, festivals, and local cuisine are highlights.
- We also like to try the top sports in our destinations, both winter and summer.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	63%	130
○ Amusement parks or theme parks	55%	129
○ Zoos or aquariums	54%	133
○ Space or science centres	25%	146
Festivals and events	33%	115
○ Cultural or traditional festivals	21%	120
○ Live theatre	10%	139
Water-based sports	13%	156
○ Scuba diving or snorkeling	10%	159
○ Swimming	5%	158
Casual sports	12%	127
○ Casual biking	7%	147
○ Fishing	5%	124
Winter-based sports	13%	141
○ Snowboarding or downhill skiing	10%	152
○ Snowshoeing or cross-country skiing	3%	146
Local cuisine	72%	108
Cultural experiences or attractions	53%	83
Shopping	53%	111
Nature experiences	35%	107
Health and wellness	29%	94
Overnight experiences	26%	102
Guided tours	12%	87

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	**55%**	138	**53%**	120
To relax and unwind	**60%**	92	**94%**	148
To check off dream travel places	**37%**	83	**44%**	74
To escape from routine	**43%**	108	**25%**	74
For adventure and excitement	**13%**	87	**6%**	66
To have memories from top travel spots	**15%**	103	**11%**	86
To be pampered	**10%**	114	**11%**	126
To learn through other cultures	**24%**	102	**40%**	103
For personal reflection and growth	**15%**	101	**11%**	95

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	**68%**	130	**72%**	136
Partner / spouse wanted to go	**58%**	123	**82%**	144
Family / friends wanted to go	**63%**	134	**76%**	148
Festival or event	**60%**	132	**37%**	103
Special event (e.g., wedding, reunion)	**52%**	142	**30%**	131
Visiting friends / family	**31%**	112	**6%**	66

49% 154 INDEX SCORE

Travel aligns with children's school schedule

37% 155 INDEX SCORE

Take time off for vacation during major holidays

34% 142 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 do not always plan all activities in advance, but will plan a few months ahead for transportation and accommodation.

56%

Primary Trip Planner

112
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	
*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.	**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.
	3 MONTHS BEFORE MY TRIP	
	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 focus on reliable and safe family travel to well-known and luxury resorts.
- We also take trips like Fun & Sun Families.

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

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

% OF TOTAL TRIPS: 14% — 138 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids 57%		
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Souvenir shopping 42%		
	Oceanside beaches 39%		
	Swimming 21%		
KEY BEHAVIOURS	Exploring natural landscapes and getting active in local sports		

% OF TOTAL TRIPS: 8% — 104 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Luxury Resort		
COMPANIONS	Nuclear family with kids 64%		
	Couple only 19%		
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Adventure
ACTIVITIES	Amusement parks or theme parks 37%		
	Local restaurants 37%		
	Souvenir shopping 27%		
KEY BEHAVIOURS	Seeking unique and well-established experiences. Want to relax and be pampered		

% OF TOTAL TRIPS: 18% — 157 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Urban Centre		
COMPANIONS	Nuclear family with kids 58%		
	Extended family 18%		
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Souvenir shopping 50%		
	Amusement parks or theme parks 47%		
	Local restaurants 46%		
KEY BEHAVIOURS	Easy to access as other family may be joining. Affordable accommodations		

% OF TOTAL TRIPS: 10% — 117 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Suburban Experience		
COMPANIONS	Nuclear family with kids 74%		
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Souvenir shopping 49%		
	Local restaurants 41%		
	Outdoor hot tub or bath 24%		
KEY BEHAVIOURS	Lower budget. Easy and straight forward trip, all about the kids		

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We are looking for trendy kid-friendly access to nature and wildlife.
- Most of our travel explores East Asian and Pacific destinations, but we also explore North America.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Japan	66%	78
US	10%	148
South Korea	5%	141
Thailand	3%	156
Singapore	3%	146

	SCORE	INDEX
Hong Kong	2%	137
Vietnam	1%	135
French Polynesia	1%	161
Germany	1%	135
China	1%	94

WHERE DO WE WANT TO GO

OKINAWA ENGLAND SPAIN AMERICA
GERMANY SINGAPORE CRETE
KOREA MEXICO HAWAII PHILIPPINES TAIWAN
AZERBAIJAN
ITALY INDONESIA AFRICA THAILAND FRANCE
AUSTRALIA TOHOKU HOKKAIDO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	84%	144
Known for stunning natural landscapes	39%	113
Is inclusive and tolerant	24%	140
Offers natural landscapes in close proximity to city amenities	20%	122
Has luxury dining, shopping, and accommodations	16%	109
Provides opportunities to view wildlife in its natural habitat	14%	113
Provides numerous opportunities for outdoor adventures	12%	113
Has vibrant nightlife and entertainment	10%	128

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

- We are likely to have visited Canada, and perhaps recently in the last few years.
- Trips to date have explored most provinces.

WHERE DO WE WANT TO GO IN CANADA

TORONTO

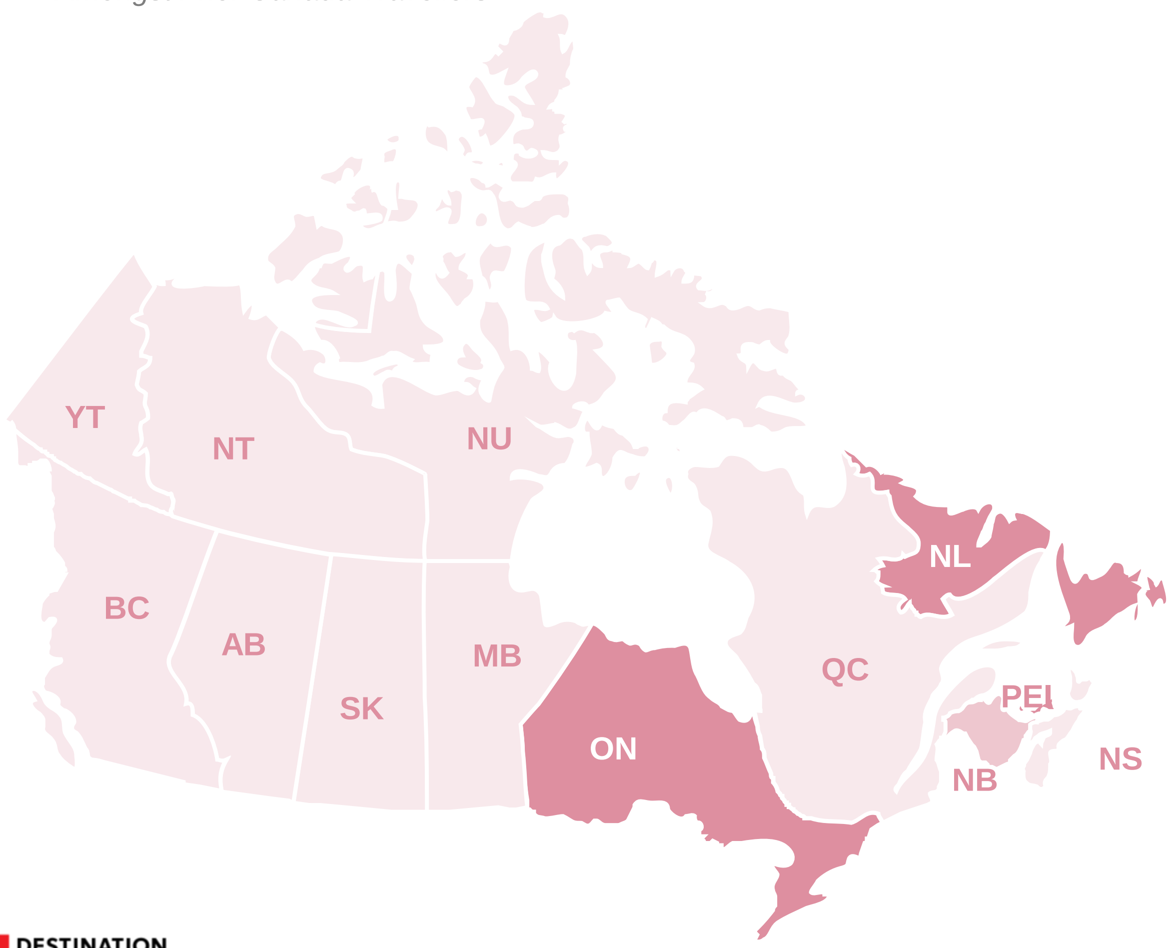
VANCOUVER

YELLOWKNIFE

NIAGARA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	18%	108
BC	26%	99
MB	0%	80
NB	5%	119
NL	9%	129
NS	0%	76
NT	10%	115
NU	0%	73
ON	40%	131
PEI	11%	129
QC	33%	90
SK	5%	109
YT	0%	54

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- For those of us who have visited Canada, is has been in winter and summer months, aligned with the school calendar.
- We are familiar with Canada as a travel destination and may consider it for a future trip.

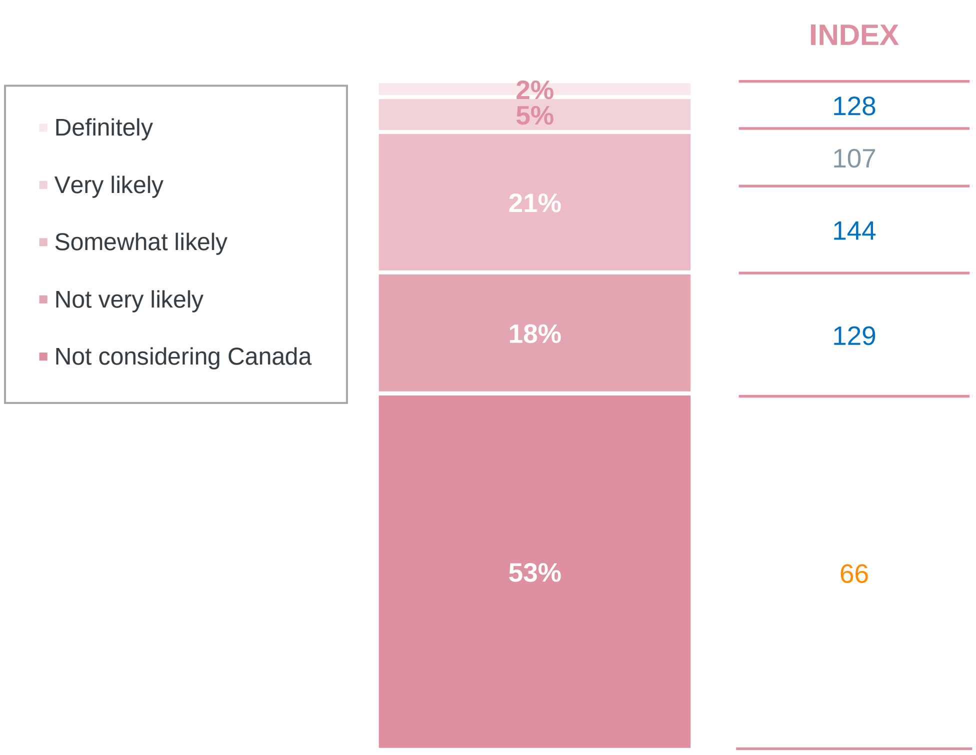
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	**39%**	**17%**	**36%**	**35%**
VS. TOTAL MARKET	18%	25%	37%	28%

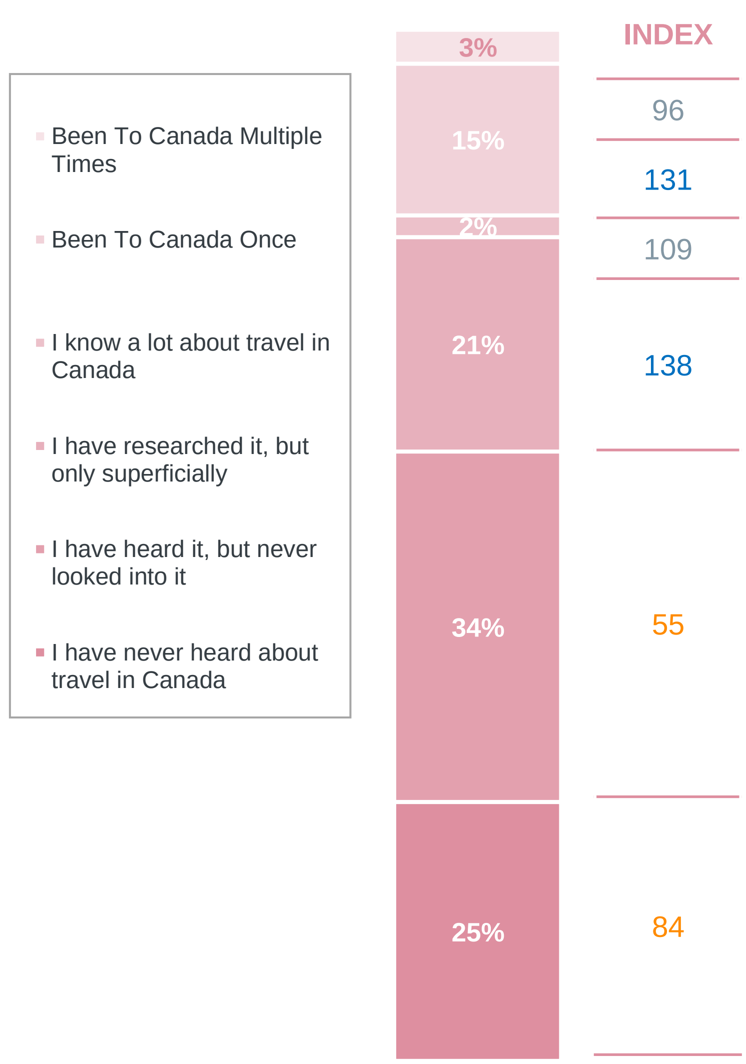
9% Been to Canada in last 5 years

138 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

19%
Had a child
128 INDEX SCORE

24%
Started a new job / career
152 INDEX SCORE

20%
Bought a new home
153 INDEX SCORE

15%
Moved to a new city
114 INDEX SCORE

56%
Child started school
149 INDEX SCORE

52%
Purchased a car
147 INDEX SCORE

4%
Retired
68 INDEX SCORE

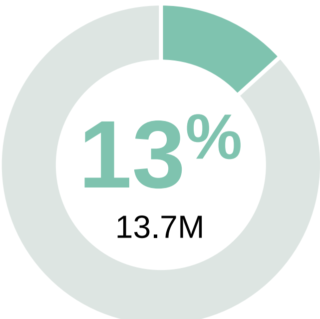
31%
Renovated house
127 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	56%	141
Travel	52%	76
Personal care and wellness	51%	108
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	43%	61
Fashion and accessories	35%	126
Technology and gadgets	26%	147

CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN POPULATION

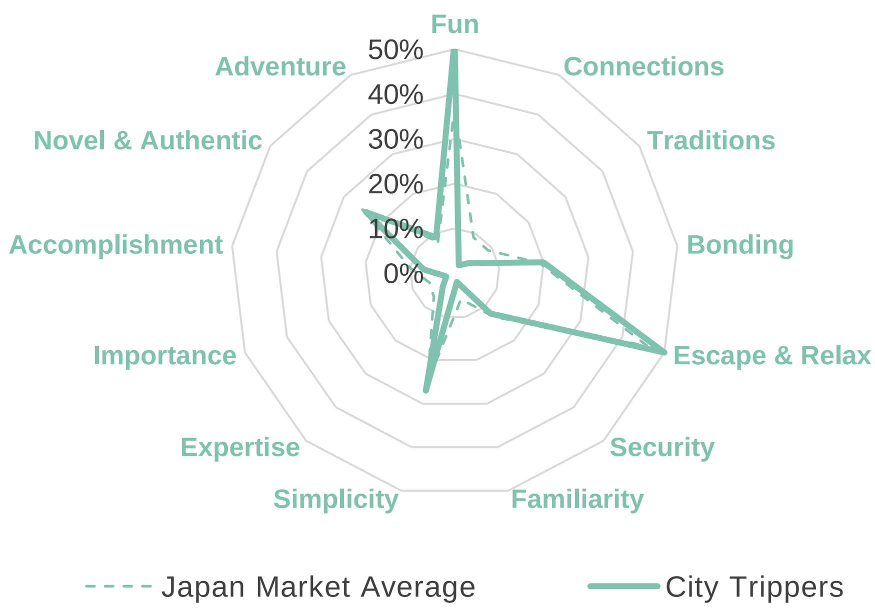
We are independent, sociable, and trendy travelers who prioritize having fun, indulging, and living in the moment. We prefer trendy, friendly locations with a variety of activities and distractions, valuing safety and ease of travel.

We relish culinary and cultural experiences, 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. Popular and famous shopping options and culinary experience are both attractive.
3. We value simplicity in our travels, preferring destinations that are convenient to get to and are built for tourism. If we can save some money even better.
4. While we primarily travel as a couple or with friends, we sometimes slow down and travel with parents or extended family.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

78

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 are attracted to trendy and established destinations that ensure planning is simple and straightforward.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally stick to the most popular areas when I visit somewhere	**92%**	126
I prefer destinations with lots of distractions and things to do	**89%**	135
Trying out local cuisine is a really important part of travel	**89%**	126
I prefer destinations with well-established tourist infrastructure	**83%**	124
I like natural attractions but I don't usually think they are the highlights of my trip	**82%**	125
I generally don't go out of my way to seek out perspectives from underrepresented communities	**81%**	123
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	**81%**	128
While travelling I generally stick to places that are direct and convenient to get to	**78%**	120
I prefer planning my trips independently and don't consult travel agencies	**77%**	122
I appreciate diversity but not likely engage deeply with Indigenous cultures	**76%**	122
I prefer traditional and well-known accommodation options when travelling	**74%**	117
I will generally not go out of my way to buy local when travelling	**57%**	124
I'm more interested in the present and don't focus much on the history of where I visit	**39%**	120

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	**71%**	129
To let loose and forget about day-to-day life	**69%**	116
To indulge myself and live in the moment	**68%**	140
To enjoy simple, straightforward travel	**53%**	109
To explore and discover new things / places	**46%**	114
To be proud to share my travel experiences	**7%**	131

DESIRED DESTINATION

	SCORE	INDEX
Fun	**85%**	140
Free-Spirited	**54%**	122
Carefree	**49%**	119
Open	**31%**	108
Trendy	**18%**	127
Practical	**5%**	103

CITY TRIPPERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We represent a diverse age range. We are employed, or may still be finishing our education, generally earning a low-medium income.
- Many of us are not parents, or our children are older and not living at home anymore.

AGE

	SCORE	INDEX
18-34	**28%**	132
35-54	**30%**	99
55+	**42%**	91
MEAN YEARS	**49.6**	87

HH INCOME (CAD)

	SCORE	INDEX
$45K or less	**27%**	128
>$45K to $100K	**63%**	68
More than $100K	**6%**	75
Refused	**5%**	124

EMPLOYMENT

	SCORE	INDEX
Employed FT	**34%**	90
Employed PT	**15%**	130
Self-employed / Business owner	**7%**	84
Retired	**11%**	93

EDUCATION

	SCORE	INDEX
Primary education or less	**2%**	123
Secondary education	**31%**	118
Post-secondary education	**67%**	78

68%
92 Have a valid passport

GENDER

40% 75 Male

60% 125 Female

0% 120 Non-binary / Other

HOUSEHOLD

10% 94 Children <18 Living At Home*

17% 95 Children 18+ Living At Home*

22% 95 Children NOT Living At Home*

68% 111 No Children

** Option is not exclusive*

JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	**13%**	88
Osaka	**8%**	94
Kanagawa	**7%**	74
Hokkaido	**7%**	124
Aichi	**6%**	84
Hyogo	**5%**	92

	SCORE	INDEX
Chiba	**4%**	83
Fukuoka	**4%**	125
Saitama	**4%**	72
Shizuoka	**4%**	117
Kyoto	**3%**	112

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

81

TRAVEL TRADE INDEX: **GROUP**

100

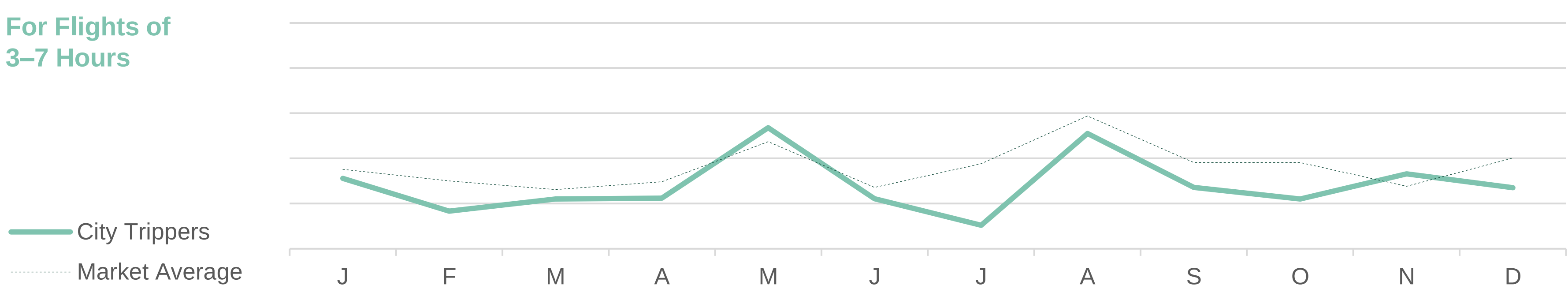
KEY terminology on this page

- **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

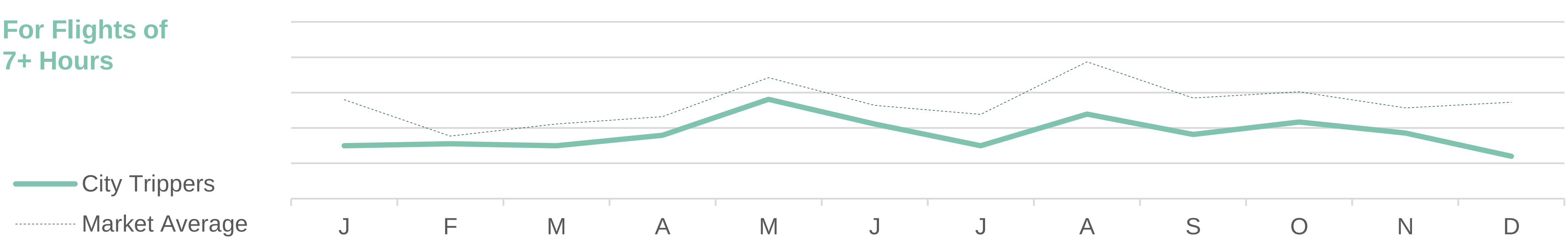
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	44%	100
3-5 Days	12%	85
1 Week Holiday	2%	83
2 Weeks Holiday	1%	81
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	49%	100
International Leisure	4%	88
Business Trip	6%	84
Added Personal To Business	1%	77
Worked During Vacation	0%	74

Incidence is frequency of 2+ times per year

CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	79%	124
Budget Hotel	40%	120
Premium Hotel	17%	92
Friend's or family's place	11%	116
Bed & Breakfast	4%	93
Hostel	3%	96

THOUGHTS ON INDIGENOUS TRAVEL

24%

78 INDEX SCORE

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

7%

99 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	61%	80
You only ever get to know a country by experiencing its culture	38%	85
I'm willing to put in the effort while travelling in order to see lesser-known places	22%	80
I'm open to travelling to destinations with limited tourist infrastructure	18%	76
I'm open to visiting destinations with challenging climates or weather conditions	15%	85
I like to explore places that are off the beaten path and less explored	8%	74

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	41%	82
Adult relatives	29%	132
Friends	19%	135
Solo	16%	96
Kids	7%	93

BUDGET

AVERAGE SPEND (ALL TRIPS)

$1,210

79
INDEX SCORE

SPEND STYLE

Value to Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	43%	76
It's important to me that I visit somewhere that is open to diversity and inclusion	32%	80
I consider the impact that I personally have on the destinations I visit	26%	82
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	19%	72
Hearing from underrepresented communities is an important part of travelling	19%	77

16%

PRIORITIZE SUSTAINABLE TRAVEL

77 INDEX SCORE

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

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

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We enjoy shopping, dining, festivals, and events.
- Our larger travel groups with extended family are well suited to well-known attractions.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	75%	114
○ Local restaurants	60%	118
○ Cafes or bakeries	35%	132
○ Street cuisine	32%	121
Shopping	64%	133
○ Souvenir shopping	56%	134
○ Visiting famous shopping centres or areas	39%	134
Cultural experiences or attractions	61%	100
○ Historical or archeological sites	49%	103
○ Observing architecture	32%	105
Festivals and events	38%	126
○ Music concerts or festivals	23%	135
○ Cultural or traditional festivals	18%	110
Family-focused attractions	35%	105
○ Amusement parks or theme parks	30%	106
○ Zoos or aquariums	25%	103
Health and wellness	32%	103
Overnight experiences	22%	86
Nature experiences	17%	74
Guided tours	12%	87
Nightlife	8%	113
Casual sports	5%	78
Winter-based sports	5%	88

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 check off dream travel places	61%	135	55%	114
To relax and unwind	68%	106	85%	134
To escape from routine	53%	129	35%	98
To spend time with family	16%	75	19%	91
To have fun with friends	20%	132	20%	122
To have memories from top travel spots	8%	82	18%	107
For adventure and excitement	20%	102	21%	112
To learn through other cultures	13%	79	9%	63
To seek solitude and isolation	11%	98	9%	102

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	50%	117	52%	117
Partner / spouse wanted to go	24%	78	56%	112
Festival or event	47%	110	44%	114
Visiting friends / family	24%	98	27%	101
Special event (e.g., wedding, reunion)	13%	81	18%	85
Kids wanted to go	8%	87	18%	99

8% 94 INDEX SCORE

Travel aligns with children's school schedule

13% 92 INDEX SCORE

Take time off for vacation during major holidays

25% 109 INDEX SCORE

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

CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We book key elements at least four months in advance for longer distance trips, but will wait until 2 months before for shorter distance trips.

43%

Primary Trip Planner

80
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 – 5.2 months** ○ Social media
	5 MONTHS BEFORE MY TRIP	
	4 MONTHS BEFORE MY TRIP	**Booked Transportation – 4.1 months** ○ Travel booking sites / apps **Booked Accommodation – 4.1 months** ○ Travel booking sites / apps
Started Researching and Planning – 3 months ○ Travel influencers	**3 MONTHS** BEFORE MY TRIP	**Booked Activities – 2.8 months** ○ Travel booking sites / apps
Booked Transportation – 2.1 months ○ Travel booking sites / apps **Booked Accommodation – 1.8 months** ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	
Booked Activities – 1.1 months ○ Direct with company	**1 MONTH** BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Most of our trips explore cities with well-known attractions and events, often with friends.
- We also take trips like Simplicity Lovers 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 **33%** 179 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Alone		**24%**
	Couple only		**23%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Souvenir shopping		**49%**
	Local restaurants		**44%**
	Visiting famous shopping centres		**37%**
KEY BEHAVIOURS	City trip to see some famous sites and take in a festival		

% OF TOTAL TRIPS **19%** 105 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Friends Trip		
DESTINATION TYPE	Urban centre		**35%**
	Small cities and town		**16%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Local restaurants		**49%**
	Souvenir shopping		**44%**
	Street cuisine		**19%**
KEY BEHAVIOURS	All about having fun, letting loose, and indulging a little with friends		

% OF TOTAL TRIPS **14%** 123 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		**41%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Souvenir shopping		**36%**
	Outdoor hot tub or bath		**33%**
	Local restaurants		**30%**
KEY BEHAVIOURS	Couples trips to relax and focus on wellness. Planned more last minute		

% OF TOTAL TRIPS **16%** 99 INDEX SCORE

SEGMENT ALIGNMENT ● ● ○ ○ ○

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		**27%**
	Historical site		**18%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Novel & Authentic
ACTIVITIES	Local restaurants		**36%**
	Historical or archeological sites		**33%**
	Religious buildings or sites		**22%**
KEY BEHAVIOURS	More focus on exploring new cultures and finding authentic experiences. Maybe staying with friends		

CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

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

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Japan	**86%**	120
US	**4%**	75
South Korea	**3%**	97
Australia	**2%**	104
Italy	**1%**	86

	SCORE	INDEX
Singapore	**1%**	95
China	**1%**	84
Hong Kong	**1%**	94
Philippines	**1%**	147
France	**1%**	80

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	**64%**	121
Has famous attractions	**54%**	136
Is easy to travel to	**44%**	113
Renowned for food and drink experiences	**41%**	124
Has well-developed tourism infrastructure	**35%**	125
Is easy to travel around once there	**23%**	119
Provides a bustling and vibrant city vibe	**14%**	116
Is a trendy destination	**14%**	139

DESTINATION CANADA

CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

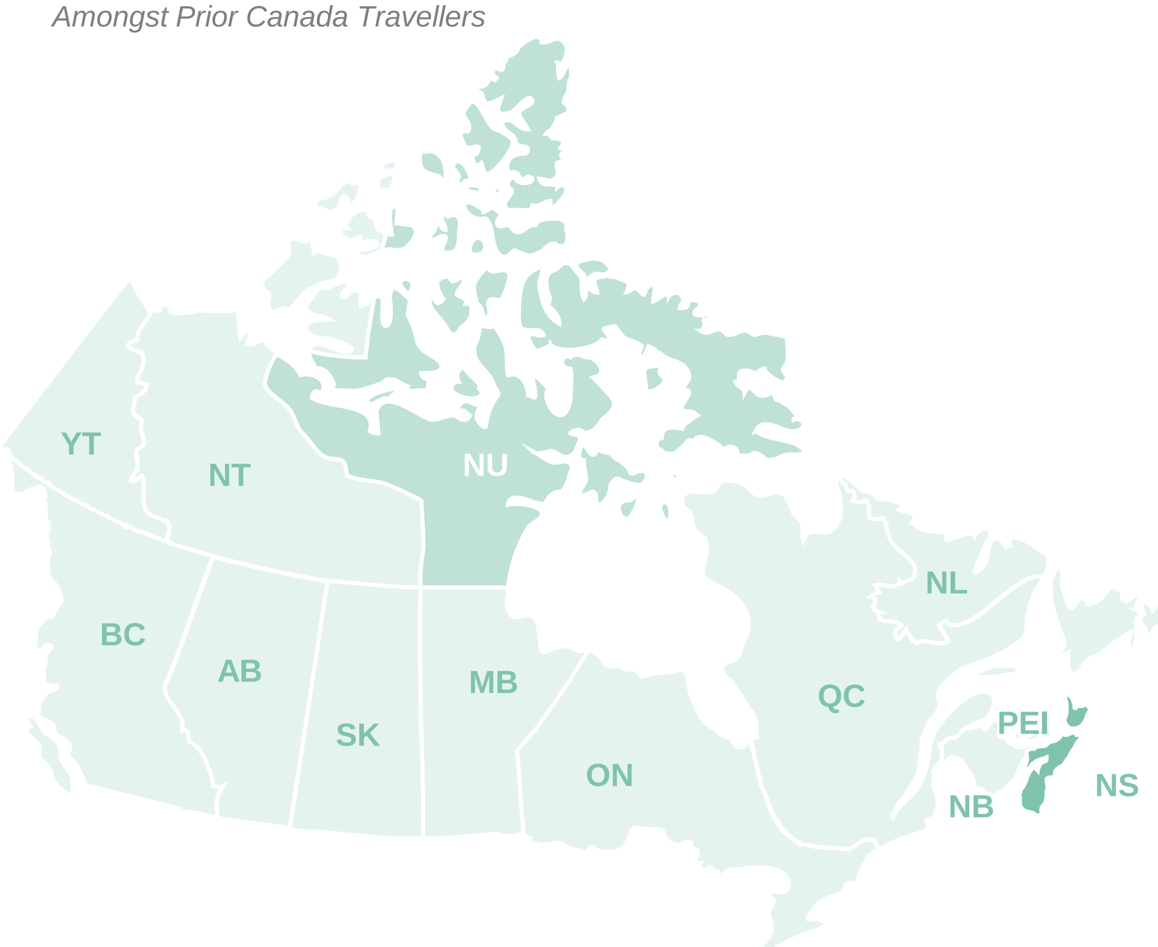
- We are unlikely to have visited Canada before.
- If we have been, it may have been to Quebec or Ontario.
- A future trip may explore Vancouver and more specifically, Whistler.

WHERE DO WE WANT TO GO IN CANADA

QUEBEC
OTTAWA
MONTREAL
CANADIAN ROCKIES
NIAGARA FALLS
VANCOUVER
PRINCE EDWARD ISLAND
WHISTLER
YUKON
BANFF

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	12%	87
BC	16%	73
MB	0%	80
NB	4%	109
NL	2%	88
NS	4%	134
NT	0%	68
NU	2%	116
ON	28%	83
PEI	4%	86
QC	31%	81
SK	2%	91
YT	4%	99

CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- When we have visited, it has been primarily in the Spring and Summer seasons.
- Overall we do not know much about Canada has a travel destination.

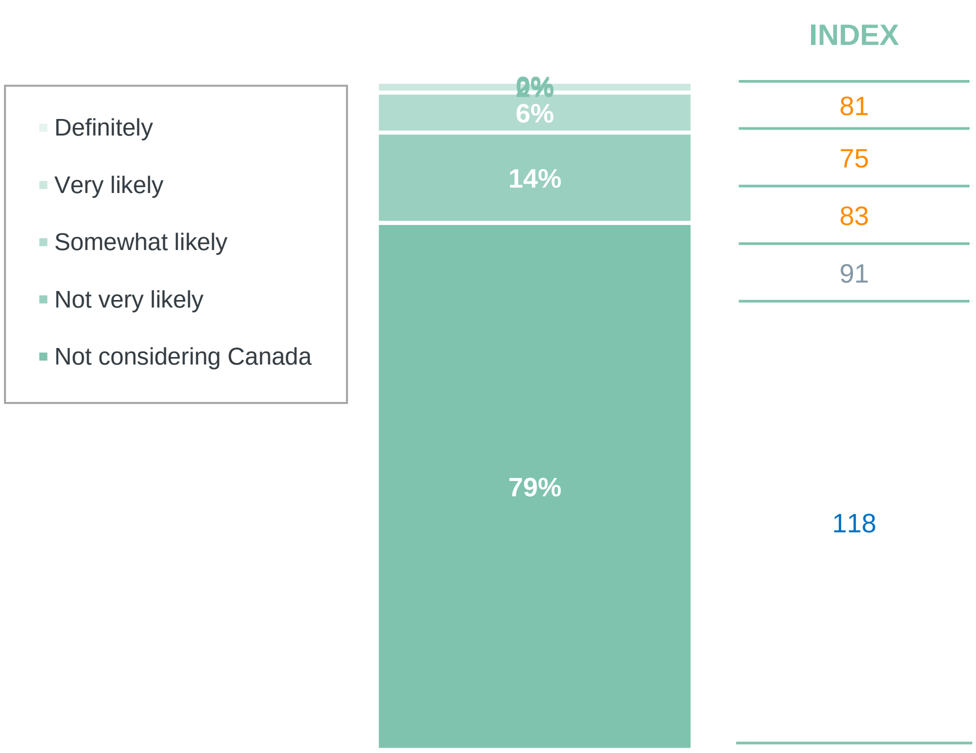
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	**21%**	**30%**	**32%**	**23%**
VS. TOTAL MARKET	18%	25%	37%	28%

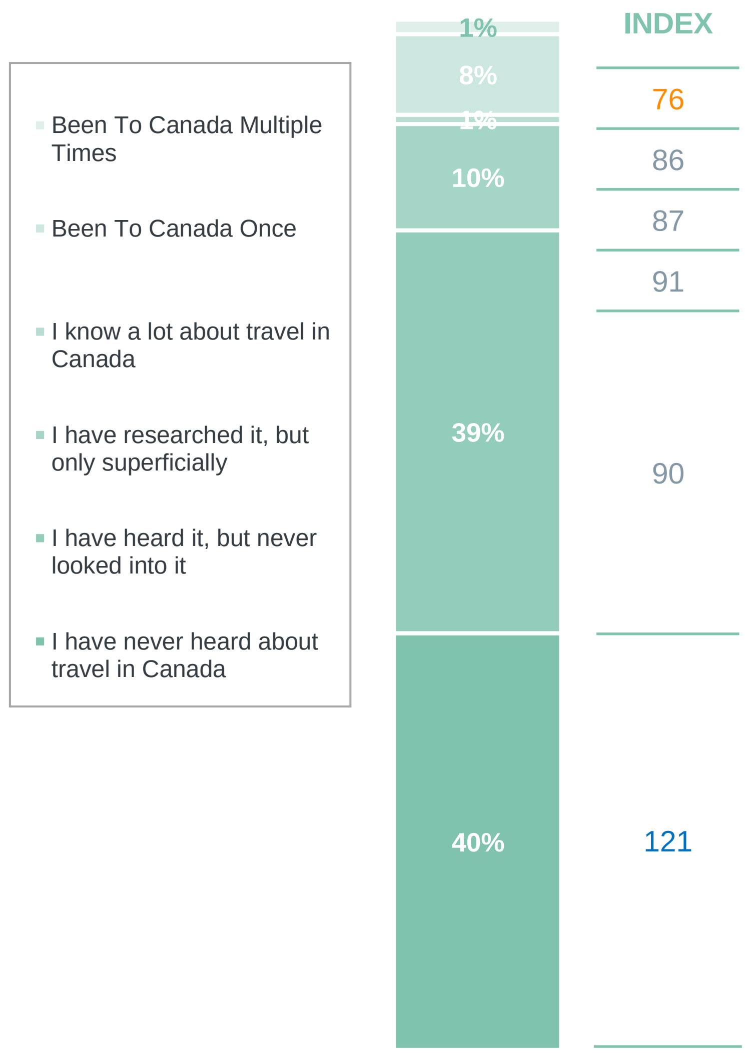
2% Been to Canada in last 5 years

82 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- In recent years our primary activity has been leisure travel.
- After spending on travel, our next biggest priority is personal care and wellness expenses.

MAJOR LIFE EVENTS IN LAST 5 YEARS

1%
Had a child
95 INDEX SCORE

12%
Started a new job / career
93 INDEX SCORE

5%
Bought a new home
94 INDEX SCORE

13%
Moved to a new city
105 INDEX SCORE

6%
Child started school
94 INDEX SCORE

27%
Purchased a car
83 INDEX SCORE

9%
Retired
100 INDEX SCORE

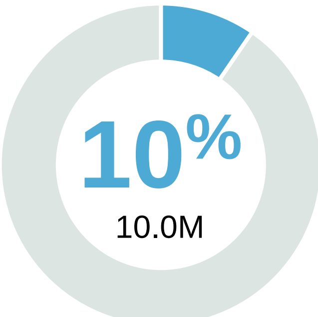
16%
Renovated house
86 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	**60%**	119
Travel	**55%**	85
Personal care and wellness	**50%**	105
Savings and investments	**38%**	70
Fashion and accessories	**34%**	120
Experiences (e.g., concerts, events).	**23%**	124

SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN POPULATION

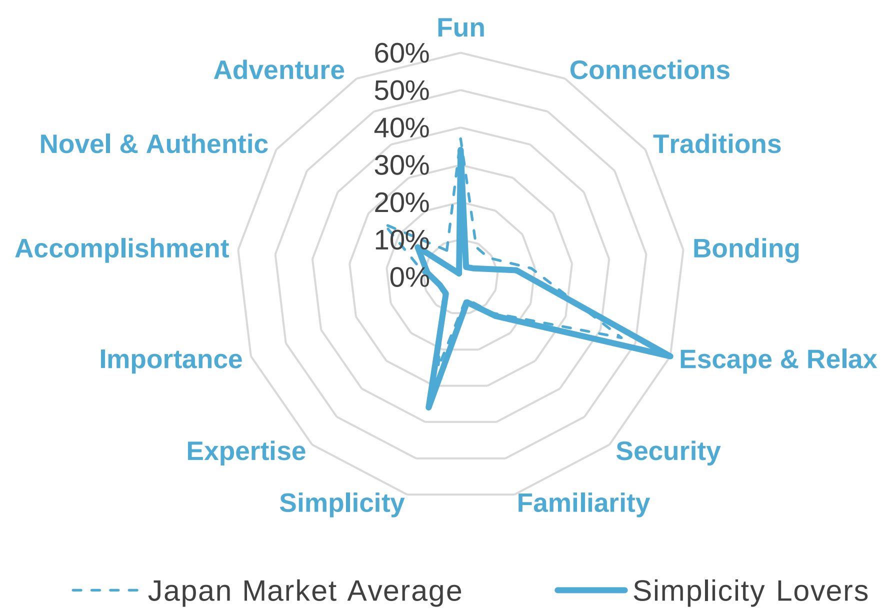
We seek peace, relaxation, and familiarity in our journeys, preferring easy and affordable destinations with a small-town feel. Prioritizing dining and nature experiences, we value simplicity and serenity.

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

WHAT YOU NEED TO KNOW ABOUT ME

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

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

77

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

SIMPLICITY LOVERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I don't see the point of posting about my trips on social media	**90%**	150
I generally avoid places that are challenging or difficult to reach	**85%**	130
Quiet, relaxed experiences are how I take care of myself on vacation	**82%**	153
I appreciate diversity but not likely engage deeply with Indigenous cultures	**78%**	125
I generally don't participate in physical activities during my holidays	**75%**	142
Generally I'm not influenced by what destinations are popular or trendy at the moment	**62%**	137
I seek out destinations that offer quiet opportunities for deep self-reflection	**57%**	140
It's not important to me that I come back from travels having learnt something new	**57%**	132
I don't consider travel to be an important milestone of growing up	**55%**	136
I generally prefer to go back to the same destinations on holiday	**38%**	149
I'm more interested in the present and don't focus much on the history of where I visit	**38%**	118
Local cuisine is not a priority for me; I focus on other aspects of travel	**29%**	126
I travel when I need to	**14%**	138

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To let loose and forget about day-to-day life	**75%**	128
To enjoy simple, straightforward travel	**68%**	139
To escape the demands of everyday life	**58%**	127
To find much-needed time to relax	**53%**	135
To be familiar with my surroundings	**9%**	135
To feel confident travel with no surprises	**8%**	149

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	**78%**	145
Safe	**67%**	124
Carefree	**52%**	126
Peaceful	**50%**	143
Familiar	**20%**	140
Practical	**7%**	121

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.
- Our kids are older or have moved out already. We are likely empty nesters.

AGE

	SCORE	INDEX
18-34	9%	60
35-54	24%	91
55+	67%	119
MEAN YEARS	58.4	123

HH INCOME (CAD)

	SCORE	INDEX
$45K or less	26%	122
>$45K to $100K	64%	78
More than $100K	6%	77
Refused	5%	119

EMPLOYMENT

	SCORE	INDEX
Employed FT	34%	89
Employed PT	13%	109
Self-employed / Business owner	10%	107
Retired	17%	116

EDUCATION

	SCORE	INDEX
Primary education or less	1%	95
Secondary education	33%	124
Post-secondary education	67%	76

60%
76 Have a valid passport

GENDER

49% 100 Male

51% 101 Female

0% 80 Non-binary / Other

HOUSEHOLD

7% 91 Children <18 Living At Home*

22% 116 Children 18+ Living At Home*

31% 116 Children NOT Living At Home*

63% 106 No Children

** Option is not exclusive*

JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	12%	81
Kanagawa	12%	132
Osaka	9%	102
Aichi	6%	89
Chiba	6%	128
Hyogo	6%	127

	SCORE	INDEX
Saitama	5%	92
Fukuoka	4%	114
Hokkaido	3%	85
Shizuoka	3%	102
Nagano	3%	126

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

88

TRAVEL TRADE INDEX: **GROUP**

51

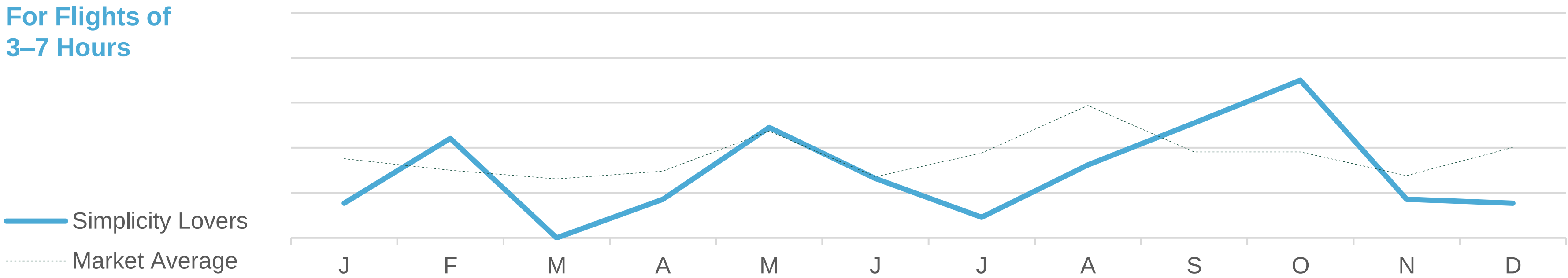
KEY terminology on this page

- **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

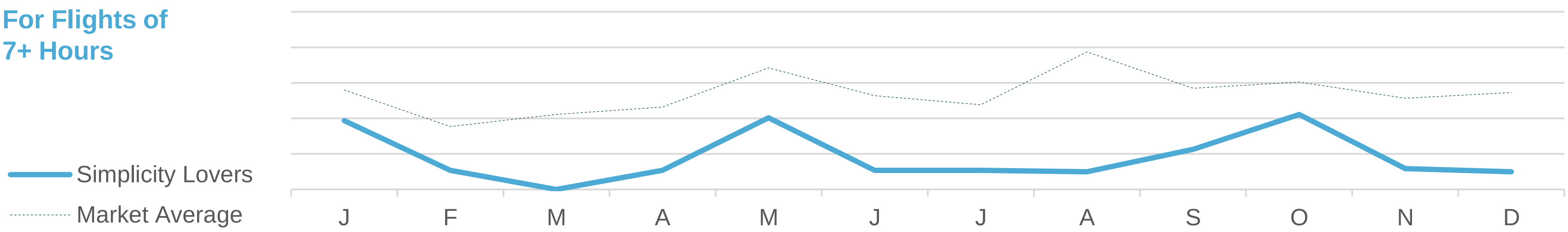
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	35%	70
3-5 Days	8%	75
1 Week Holiday	1%	73
2 Weeks Holiday	0%	68
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	40%	73
International Leisure	1%	71
Business Trip	5%	78
Added Personal To Business	1%	68
Worked During Vacation	0%	70

Incidence is frequency of 2+ times per year

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**77%**	114
Budget Hotel	**36%**	112
Premium Hotel	**12%**	83
Friend's or family's place	**10%**	106
Bed & Breakfast	**3%**	86
Campsite	**2%**	94

THOUGHTS ON INDIGENOUS TRAVEL

22%

75 INDEX SCORE

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

2%

68 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	**62%**	82
You only ever get to know a country by experiencing its culture	**31%**	69
I'm open to travelling to destinations with limited tourist infrastructure	**26%**	93
I'm willing to put in the effort while travelling in order to see lesser-known places	**26%**	85
I like to explore places that are off the beaten path and less explored	**24%**	98
I'm open to visiting destinations with challenging climates or weather conditions	**12%**	77

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	**58%**	105
Adult relatives	**23%**	106
Solo	**19%**	102
Friends	**10%**	89
Kids	**5%**	92

BUDGET

AVERAGE SPEND (ALL TRIPS)

$1,110

75
INDEX SCORE

SPEND STYLE
Value / Affordable

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**51%**	92
It's important to me that I visit somewhere that is open to diversity and inclusion	**34%**	84
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**25%**	85
I consider the impact that I personally have on the destinations I visit	**22%**	74
Hearing from underrepresented communities is an important part of travelling	**19%**	77

15%

PRIORITIZE SUSTAINABLE TRAVEL

75 INDEX SCORE

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

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

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**70%**	102
○ Local restaurants	**50%**	94
○ Cooking lessons	**18%**	97
○ Cafes or bakeries	**19%**	77
Cultural experiences or attractions	**59%**	96
○ Historical or archeological sites	**49%**	103
○ Museums	**26%**	91
Health and wellness	**38%**	125
○ Outdoor hot tub or bath	**37%**	128
○ Sauna or steam bath	**9%**	109
Nature experiences	**32%**	101
○ Nature walks	**23%**	114
○ Fall colours	**18%**	111
Shopping	**41%**	87
○ Souvenir shopping	**37%**	93
○ Visiting famous shopping centres or areas	**19%**	79
Overnight experiences	**20%**	80
Family-focused attractions	**19%**	90
Festivals and events	**14%**	66
Guided tours	**7%**	69
Casual sports	**7%**	93
Water-based sports	**3%**	85
Winter-based sports	**3%**	78

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF **3–7 HOURS**		TRIPS OF FLIGHTS OF **7+ HOURS**	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	**87%**	137	**72%**	115
To escape from routine	**56%**	137	**58%**	147
To check off dream travel places	**39%**	86	**44%**	74
To spend time with family	**35%**	105	**48%**	116
To have fun with friends	**18%**	127	**30%**	145
To have memories from top travel spots	**0%**	58	**5%**	72
To seek solitude and isolation	**8%**	91	**12%**	120
For personal reflection and growth	**13%**	92	**0%**	65
To be pampered	**9%**	110	**0%**	75

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	**30%**	85	**36%**	87
Family / friends wanted to go	**22%**	76	**37%**	96
Festival or event	**12%**	50	**5%**	48
Visiting friends / family	**4%**	56	**20%**	89
Special event (e.g., wedding, reunion)	**4%**	67	**12%**	61
Kids wanted to go	**14%**	91	**5%**	91

3% 88 INDEX SCORE

Travel aligns with children's school schedule

5% 73 INDEX SCORE

Take time off for vacation during major holidays

19% 86 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 do not need to book many items, as we are often driving distance and do not book activities.

47%

Primary Trip Planner

90
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	
*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.	**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.
	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 visit quiet and relaxing destinations where we can spend quality time.
- We sometime take busier group 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 **17%** 138 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		**41%**
	Extended family		**25%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Souvenir shopping		**36%**
	Outdoor hot tub or bath		**33%**
	Local restaurants		**30%**
KEY BEHAVIOURS	A budget friendly destination without crowds, where we can connect with extended family		

% OF TOTAL TRIPS **11%** 114 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Countryside & Village		
COMPANIONS	Couple only		**43%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Novel & Authentic
ACTIVITIES	Souvenir shopping		**43%**
	Outdoor hot tub or bath		**38%**
	Nature walks		**21%**
KEY BEHAVIOURS	Couples trip to relax and unwind. Activities are low impact, sightseeing and shopping		

% OF TOTAL TRIPS **18%** 140 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Historical Site		
COMPANIONS	Couple only		**48%**
	Extended family		**27%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Novel & Authentic
ACTIVITIES	Historical or archeological sites		**70%**
	Local restaurants		**41%**
	Observing architecture		**37%**
KEY BEHAVIOURS	Destination is selected for a specific attraction we want to cross off the list		

% OF TOTAL TRIPS **21%** 152 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Alone		**24%**
	Couple only		**23%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Souvenir shopping		**49%**
	Local restaurants		**44%**
	Visiting famous shopping centres		**37%**
KEY BEHAVIOURS	Exploring a fun and trendy destination, trying local cuisine and seeing unique attractions		

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are affordable, accessible, not-too crowded, and have pleasant weather.
- We take shorter trips, mostly domestic, with rare trips to North America.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Japan	87%	124
US	6%	102
South Korea	1%	70
Thailand	1%	98
UK	1%	93

	SCORE	INDEX
Australia	1%	76
China	1%	84
Italy	1%	75
Switzerland	1%	120
France	0%	76

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Isn’t too crowded	67%	147
Is not too expensive	66%	123
Is easy to travel to	54%	130
Doesn’t take too long to get there	52%	136
Has a mild and pleasant climate	41%	146
Provides a sense of personal safety	41%	141
Is easy to travel around once there	29%	135
Has a small town feel	18%	129

SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

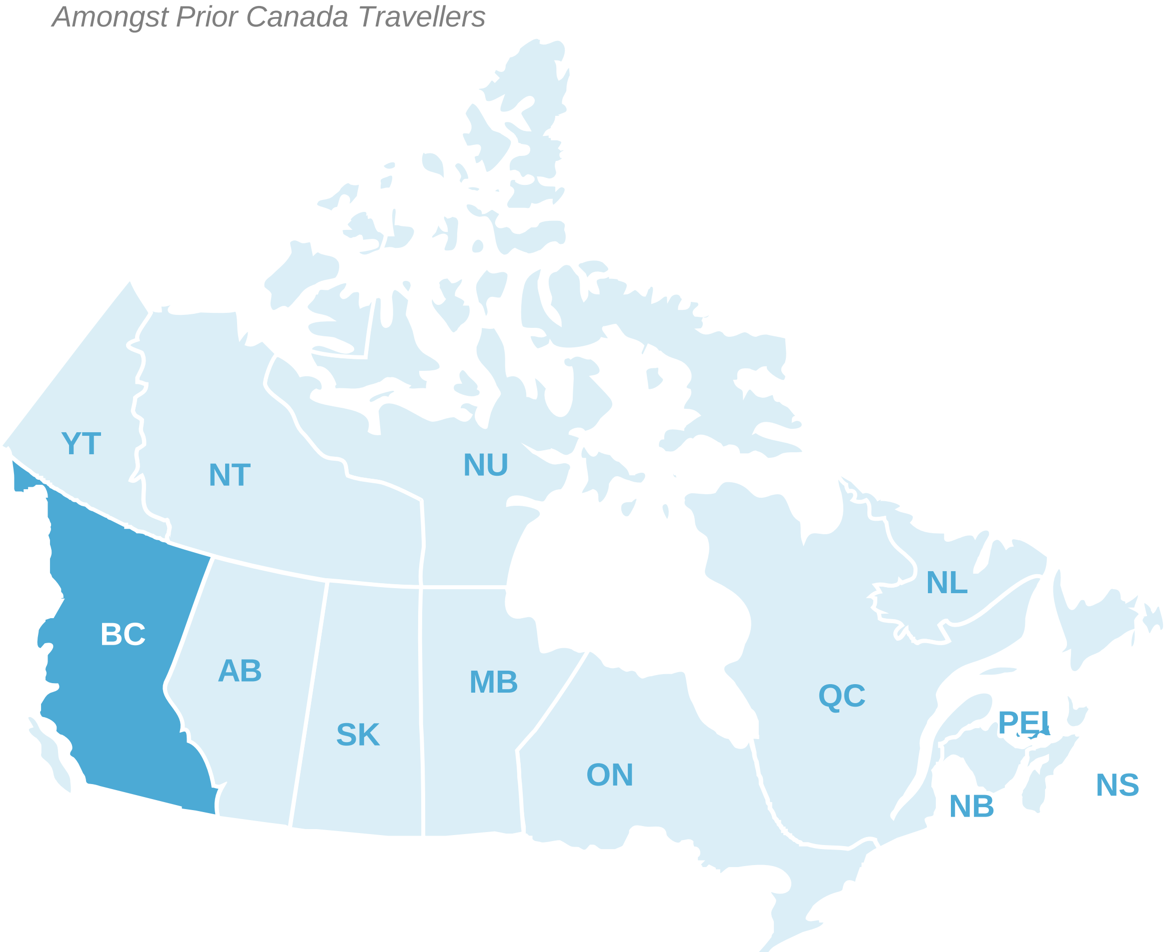
- We likely have not been to Canada before, and do not know too much about it as a travel destination.
- Trips to date have taken us to British Columbia and Ontario.
- We are not likely to consider Canada in the next two years.

WHERE DO WE WANT TO GO IN CANADA

NIAGARA FALLS
TORONTO
DAWSON CITY
MONTREAL
OTTAWA
PRINCE EDWARD ISLAND
YELLOWKNIFE
VANCOUVER

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	11%	83
BC	38%	134
MB	0%	80
NB	0%	64
NL	0%	78
NS	0%	76
NT	4%	85
NU	0%	73
ON	35%	111
PEI	10%	126
QC	33%	86
SK	0%	82
YT	4%	95

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

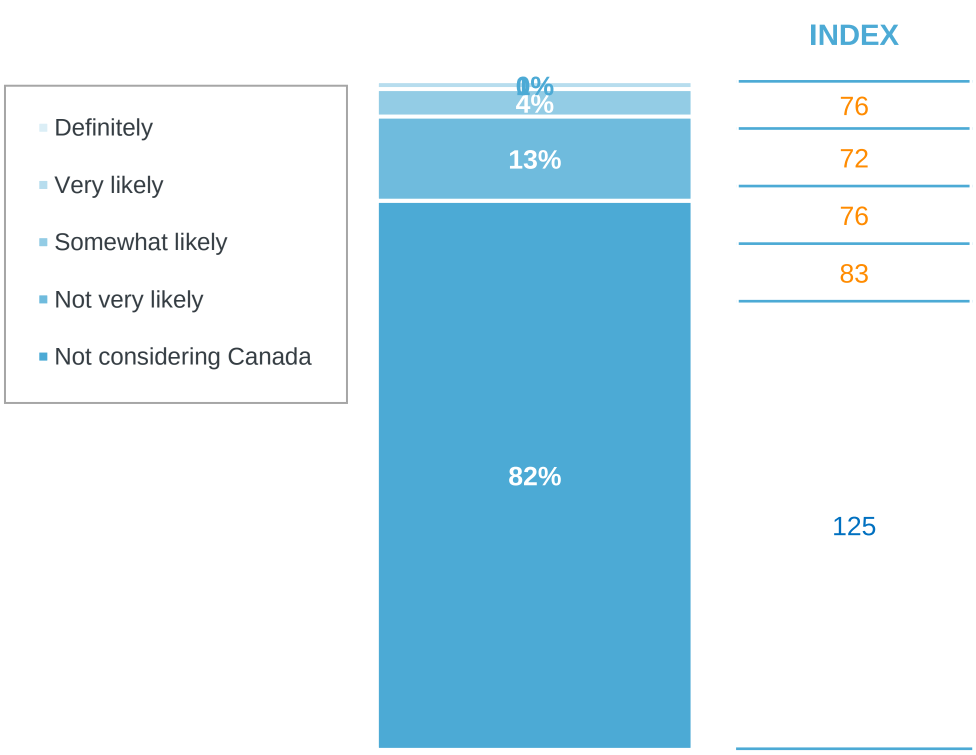
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	**7%**	**33%**	**51%**	**21%**
VS. TOTAL MARKET	18%	25%	37%	28%

0%

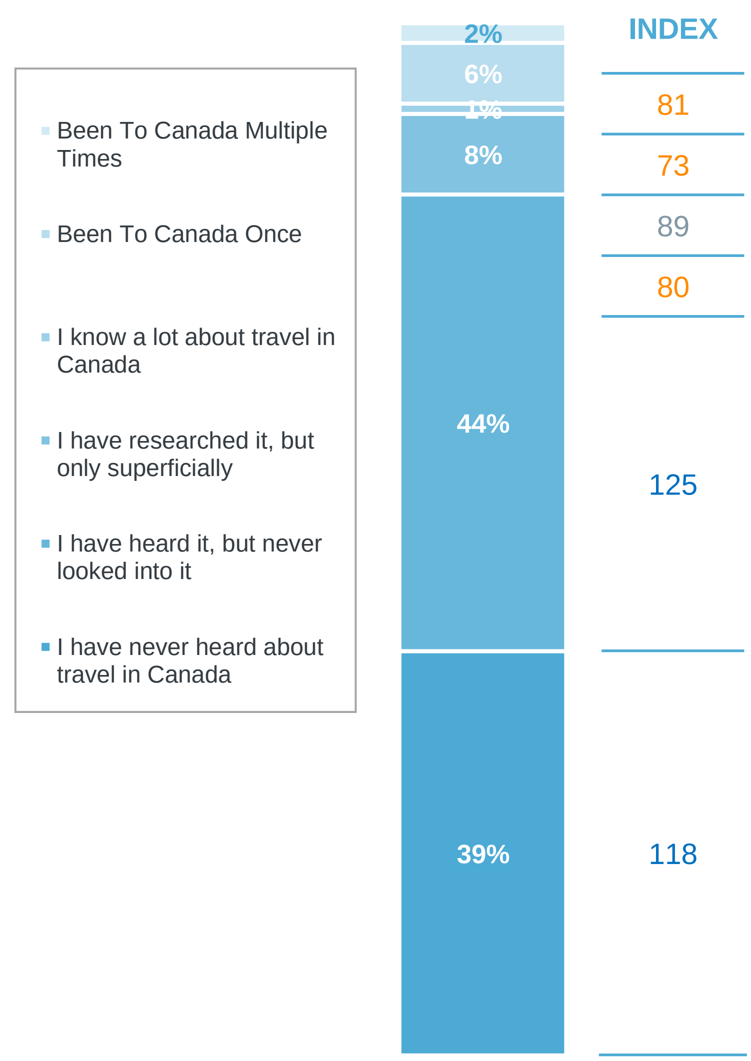
Been to Canada in last 5 years

72 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 and continuing to build our savings.

MAJOR LIFE EVENTS IN LAST 5 YEARS

0%
Had a child
92 INDEX SCORE

15%
Started a new job / career
106 INDEX SCORE

5%
Bought a new home
90 INDEX SCORE

10%
Moved to a new city
84 INDEX SCORE

5%
Child started school
92 INDEX SCORE

29%
Purchased a car
87 INDEX SCORE

11%
Retired
120 INDEX SCORE

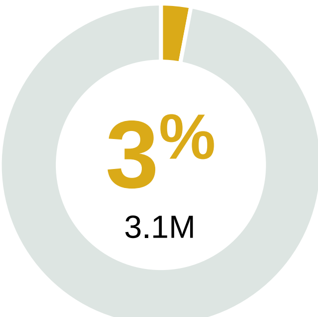
17%
Renovated house
87 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	62%	101
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	53%	95
Personal care and wellness	52%	112
Savings and investments	51%	121
Fashion and accessories	22%	79
Home and decor	19%	111

FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN POPULATION

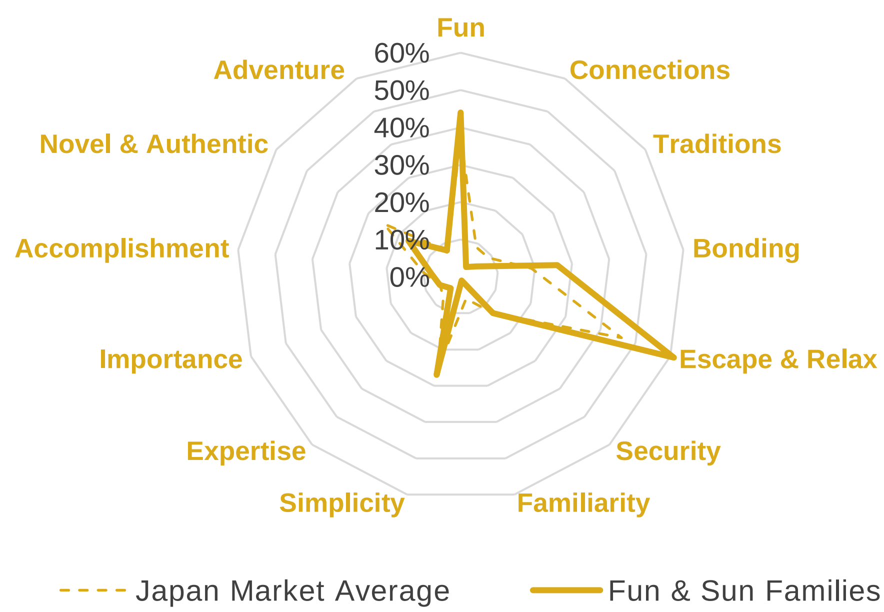
We cherish relaxation and shared family experiences in familiar, kid-friendly, and affordable destinations. We prioritize fun and simplicity over extravagance, gravitating towards well-known beaches and local spots with good communication standards.

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 both new and traditional activities.
3. We plan our annual vacation a few months in advance, sticking to familiar and reliable destinations.
4. While we generally prefer to stay in our comfort zone, we are excited to explore local shopping and cuisine when we travel.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

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

86

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, and escaping everyday life is our form of indulgence.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally only choose destinations with comfortable climate and weather conditions	**90%**	127
I generally don't seek out destinations in order to explore my ancestral heritage	**86%**	126
While travelling I generally stick to places that are direct and convenient to get to	**85%**	130
I generally avoid places that are challenging or difficult to reach	**82%**	126
I prefer destinations with well-established tourist infrastructure	**80%**	118
I prefer destinations with lots of distractions and things to do	**79%**	119
I don't consider diversity and inclusion factors when choosing travel destinations	**73%**	126
You can get to know a country without experiencing its culture	**66%**	124
I generally don't try to learn local languages	**60%**	127
I tend to choose a destination to visit based off value for money	**59%**	145
I will generally not go out of my way to buy local when travelling	**59%**	127
I'm more interested in the present and don't focus much on the history of where I visit	**48%**	137
I love posting my trips on social media to share with friends	**37%**	125

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	**75%**	136
To let loose and forget about day-to-day life	**73%**	125
To escape the demands of everyday life	**65%**	141
To find much-needed time to relax	**51%**	129
To share quality time with others	**28%**	117
To bond through shared experiences	**24%**	129

DESIRED DESTINATION

	SCORE	INDEX
Fun	**76%**	126
Safe	**67%**	123
Relaxed	**66%**	125
Carefree	**51%**	123
Peaceful	**43%**	129
Trendy	**20%**	135

FUN & SUN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are aged 25-54, with at least one child.
- We are likely to be female.
- We are primarily employed earning a lower income or working as full-time parents.

53%
60 Have a valid passport

GENDER

43%	83	Male
57%	117	Female
0%	80	Non-binary / Other

HOUSEHOLD

88%	148	Children <18 Living At Home*
9%	58	Children 18+ Living At Home*
6%	58	Children NOT Living At Home*
6%	52	No Children

** Option is not exclusive*

AGE

	SCORE	INDEX
18-34	24%	117
35-54	67%	147
55+	9%	54
MEAN YEARS	41.5	54

HH INCOME (CAD)

	SCORE	INDEX
$45K or less	18%	86
>$45K to $100K	70%	131
More than $100K	7%	88
Refused	5%	131

EMPLOYMENT

	SCORE	INDEX
Employed FT	60%	139
Employed PT	13%	110
Self-employed / Business owner	6%	72
Retired	2%	60

EDUCATION

	SCORE	INDEX
Primary education or less	2%	110
Secondary education	22%	84
Post-secondary education	76%	115

JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Hokkaido	9%	145
Tokyo	9%	59
Osaka	8%	83
Saitama	8%	148
Aichi	7%	104
Kanagawa	7%	66

	SCORE	INDEX
Nagasaki	5%	163
Chiba	4%	75
Hyogo	4%	75
Fukuoka	3%	89
Miyagi	3%	135

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

153

TRAVEL TRADE INDEX: **GROUP**

98

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

*Base size is too small to report

For Flights of 7+ Hours

*Base size is too small to report

TRIP DURATION

		INDEX
1-2 Days	36%	73
3-5 Days	6%	68
1 Week Holiday	1%	76
2 Weeks Holiday	1%	100
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	38%	67
International Leisure	0%	67
Business Trip	5%	81
Added Personal To Business	4%	104
Worked During Vacation	3%	114

Incidence is frequency of 2+ times per year

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**79%**	125
Budget Hotel	**44%**	128
Friend's or family's place	**11%**	118
Premium Hotel	**11%**	79
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**7%**	142
All-inclusive resort	**3%**	109

THOUGHTS ON INDIGENOUS TRAVEL

27%

82 INDEX SCORE

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

1%

62 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	**52%**	63
You only ever get to know a country by experiencing its culture	**34%**	76
I'm open to travelling to destinations with limited tourist infrastructure	**20%**	82
I'm willing to put in the effort while travelling in order to see lesser-known places	**15%**	70
I like to explore places that are off the beaten path and less explored	**12%**	80
I'm open to visiting destinations with challenging climates or weather conditions	**10%**	73

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We primarily travel with our immediate family.
- We keep budgets conservative.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**86%**	143
Kids	**80%**	148
Adult relatives	**16%**	68
Solo	**4%**	67
Other	**4%**	113

BUDGET

AVERAGE SPEND (ALL TRIPS)

$1,390

87
INDEX SCORE

SPEND STYLE

Value / Affordable

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	**41%**	73
I consider the impact that I personally have on the destinations I visit	**28%**	85
It's important to me that I visit somewhere that is open to diversity and inclusion	**27%**	74
Hearing from underrepresented communities is an important part of travelling	**27%**	90
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**22%**	78

19%

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."

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Family focussed attractions are the #1 priority.
- We like to explore local cuisine and shopping, and often seek out spas or other wellness opportunities.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	88%	153
○ Amusement parks or theme parks	82%	154
○ Zoos or aquariums	72%	152
○ Space or science centres	25%	145
Shopping	56%	118
○ Souvenir shopping	48%	118
○ Visiting famous shopping centres or areas	35%	124
Health and wellness	41%	139
○ Outdoor hot tub or bath	39%	136
○ Spas	10%	104
Water-based sports	8%	118
○ Swimming	3%	127
○ Scuba diving or snorkeling	3%	104
Local cuisine	67%	96
○ Local restaurants	49%	92
○ Street cuisine	31%	116
Cultural experiences or attractions	42%	58
Nature experiences	34%	104
Festivals and events	25%	94
Overnight experiences	15%	63
Guided tours	9%	77
Winter-based sports	6%	100
Casual sports	3%	66

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	52%	132	100%	161
To relax and unwind	88%	139	65%	105
To escape from routine	52%	129	45%	120
To check off dream travel places	24%	54	38%	54
To have memories from top travel spots	22%	127	35%	153
For adventure and excitement	26%	112	17%	99
To have fun with friends	0%	73	0%	77
For a romantic getaway	12%	85	0%	67
For personal reflection and growth	12%	92	0%	65

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	100%	153	100%	155
Partner / spouse wanted to go	76%	147	83%	145
Family / friends wanted to go	53%	120	18%	71
Festival or event	37%	93	17%	69
Special event (e.g., wedding, reunion)	41%	124	17%	79
Visiting friends / family	12%	74	0%	58

36% 136 INDEX SCORE

Travel aligns with children's school schedule

19% 109 INDEX SCORE

Take time off for vacation during major holidays

33% 137 INDEX SCORE

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

FUN & SUN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We plan in advance and secure accommodation early. Destinations are often selected at our kids requests.

37%

Primary Trip Planner

63
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	
*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.	**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.
	3 MONTHS BEFORE MY TRIP	
	2 MONTHS BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips primarily feature destinations known for family attractions.
- We also take some 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: 26% — 168 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Urban Centre			
COMPANIONS	Nuclear family with kids			**58%**
	Extended family			**18%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity	
ACTIVITIES	Souvenir shopping			**50%**
	Amusement parks or theme parks			**47%**
	Local restaurants			**46%**
KEY BEHAVIOURS	Destination with a specific attraction for the kids. Saving on accommodation and spending on fun			

% OF TOTAL TRIPS: 15% — 129 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Suburban Experience			
COMPANIONS	Nuclear family with kids			**74%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding	
ACTIVITIES	Souvenir shopping			**49%**
	Amusement parks or theme parks			**37%**
	Staying at resort or cabin			**12%**
KEY BEHAVIOURS	Family trip to less tourism focussed destination. Maybe trying alternative accommodation			

% OF TOTAL TRIPS: 10% — 113 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Beach Resort			
COMPANIONS	Nuclear family with kids			**95%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity	
ACTIVITIES	Zoos or aquariums			**43%**
	Oceanside beaches			**39%**
	Other water-based sports			**19%**
KEY BEHAVIOURS	Family trip planned well in advance. Spending more for the resort experience			

% OF TOTAL TRIPS: 12% — 119 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Small Cities & Towns			
COMPANIONS	Couple only			**41%**
	Extended family			**25%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun	
ACTIVITIES	Souvenir shopping			**36%**
	Outdoor hot tub or bath			**33%**
	Local restaurants			**30%**
KEY BEHAVIOURS	Quick and easy travel to a quiet destination to spend time together as a couple			

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are kid-friendly, easy to access, and have affordable options.
- We take shorter trips, mostly domestic.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Japan	90%	131
US	5%	87
South Korea	2%	81
Spain	1%	142
Australia	1%	82

	SCORE	INDEX
Guam	1%	140
France	1%	100
Italy	1%	89
China	1%	81
Canada	1%	109

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	91%	148
Is not too expensive	67%	124
Is easy to travel to	51%	126
Has famous attractions	45%	118
Doesn't take too long to get there	41%	118
Language is not a barrier	22%	128
Good connectivity (Wi-Fi, cell service, etc.)	22%	134
Is a trendy destination	11%	124

FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

- We likely have not been to Canada before, and do not know a lot about Canada as a travel destination.
- To date, any travel to Canada has primarily been to British Columbia or Quebec.

WHERE DO WE WANT TO GO IN CANADA

QUEBEC

OTTAWA

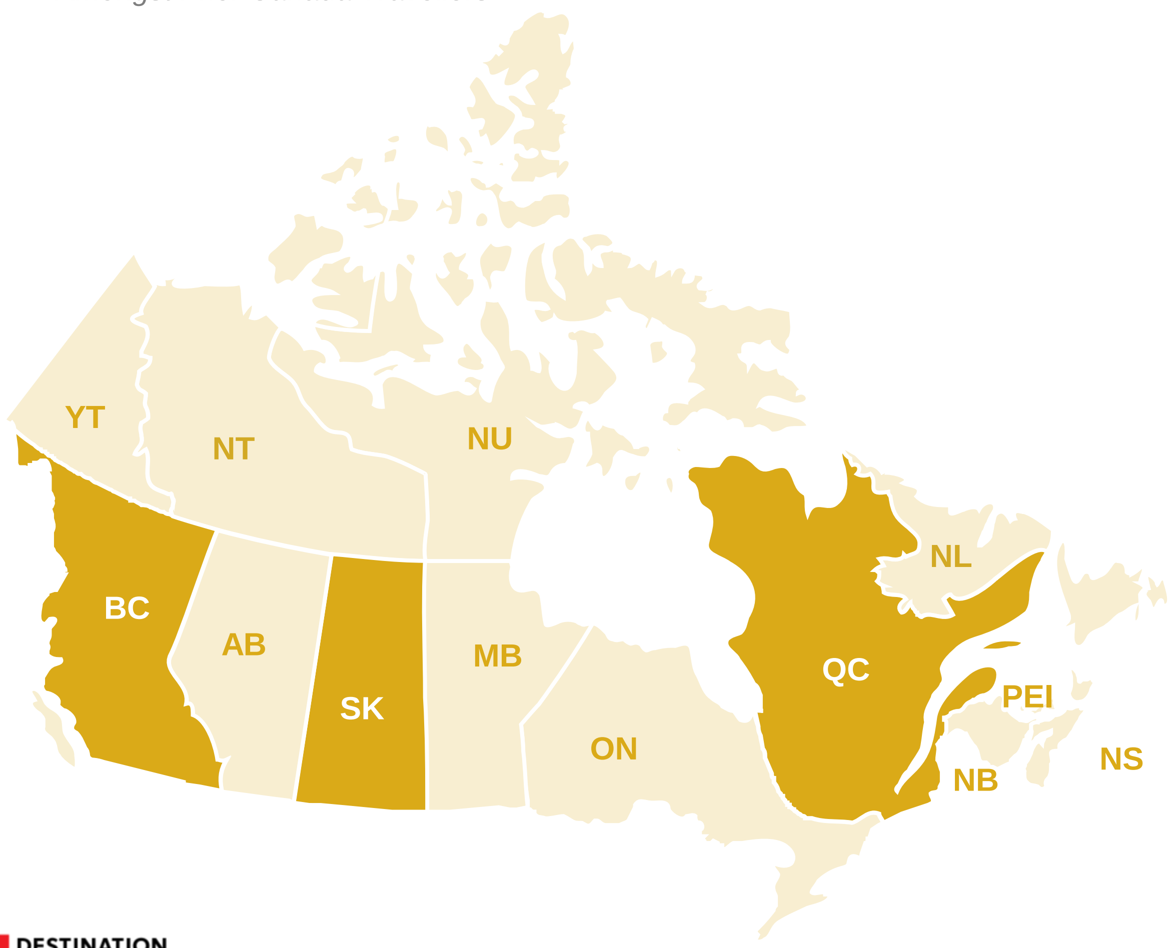
TORONTO

VANCOUVER

ROCKY MOUNTAINS

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	0%	44
BC	37%	130
MB	0%	80
NB	0%	64
NL	0%	78
NS	0%	76
NT	0%	68
NU	0%	73
ON	23%	62
PEI	0%	56
QC	48%	152
SK	12%	148
YT	0%	54

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- If we have visited Canada before, it has been in a variety of seasons.
- Generally, we are not planning a future visit.

CANADA TRAVEL MONTHS ON A PAST TRIP

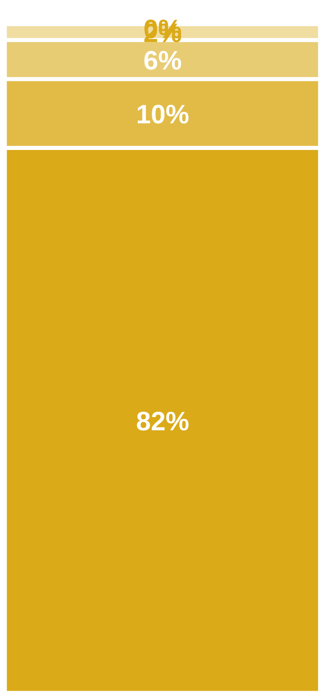
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	**36%**	**50%**	**35%**	**10%**
VS. TOTAL MARKET	18%	25%	37%	28%

2%

Been to Canada in last 5 years

88 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



	INDEX
Definitely	76
Very likely	82
Somewhat likely	83
Not very likely	64
Not considering Canada	124

FAMILIARITY WITH CANADA

	INDEX
Been To Canada Multiple Times	69
Been To Canada Once	73
I know a lot about travel in Canada	70
I have researched it, but only superficially	67
I have heard it, but never looked into it	106
I have never heard about travel in Canada	136

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 did not just have a child, our young children are transitioning from daycare to school life.

MAJOR LIFE EVENTS IN LAST 5 YEARS

35% Had a child — 158 INDEX SCORE	**17%** Started a new job / career — 120 INDEX SCORE	**16%** Bought a new home — 136 INDEX SCORE	**22%** Moved to a new city — 154 INDEX SCORE
50% Child started school — 143 INDEX SCORE	**47%** Purchased a car — 133 INDEX SCORE	**3%** Retired — 60 INDEX SCORE	**9%** Renovated house — 64 INDEX SCORE

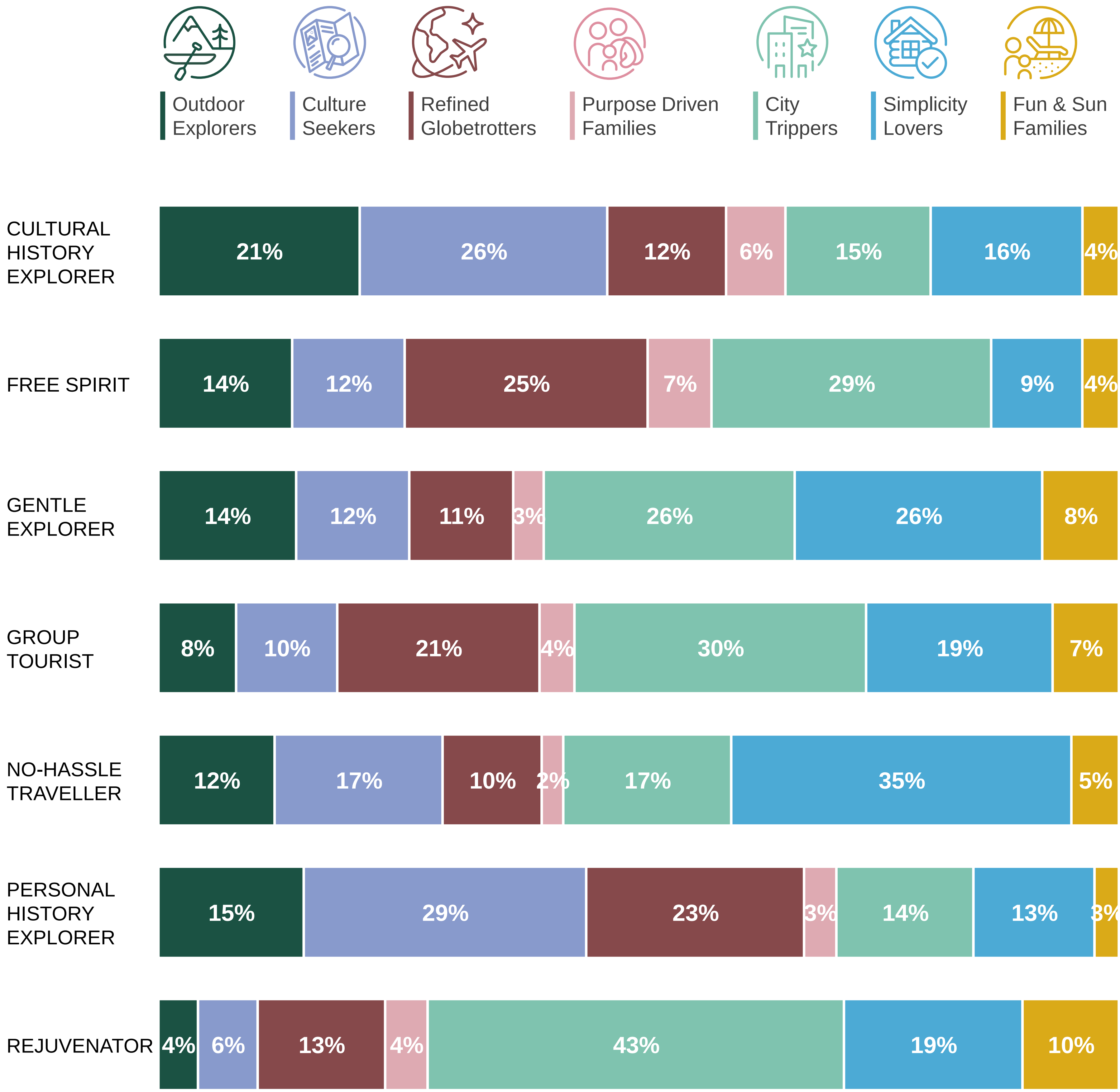
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Personal care and wellness	60%	147
Savings and investments	54%	132
Travel	45%	58
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	42%	58
Fashion and accessories	40%	141
Home and decor	24%	147

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).