

MEXICO MARKET PROFILES

As one of the fastest-growing travel markets in the world, Mexican travellers are renowned for their passion for exploring as a family.

With a blend of fun and relaxation, Mexican tourists seek destinations that create unforgettable moments for all ages, embracing both new cultures and learning experiences with a sense of togetherness.



MEXICO



**DESTINATION
CANADA**



A GUIDE TO UNDERSTANDING THE PROFILE



THE STRUCTURE

Understand The Market

- Overall segment sizes in the market
- Segment comparison by key metrics

01

Explore The Segments

- Detailed profiles per segment

04

Glossary

- Additional definitions for key terminology referenced in this profile

104



HOW TO READ THE DATA

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

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

FOR EXAMPLE:

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

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

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

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

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



KEY DEFINITIONS

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

! KEY terminology on this page...

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



MARKET OVERVIEW

KEY MARKET HIGHLIGHTS

- Mexican segments overall have a general view of travel as an important way to learn about new cultures, and a desire to learn something new from the destinations visited.
- Overall preference for reliable, safe, and well-known destinations and interest in trendy locales.
- With larger families and travel groups, more likely to be travelling during major holidays and aligned with kids schedules.

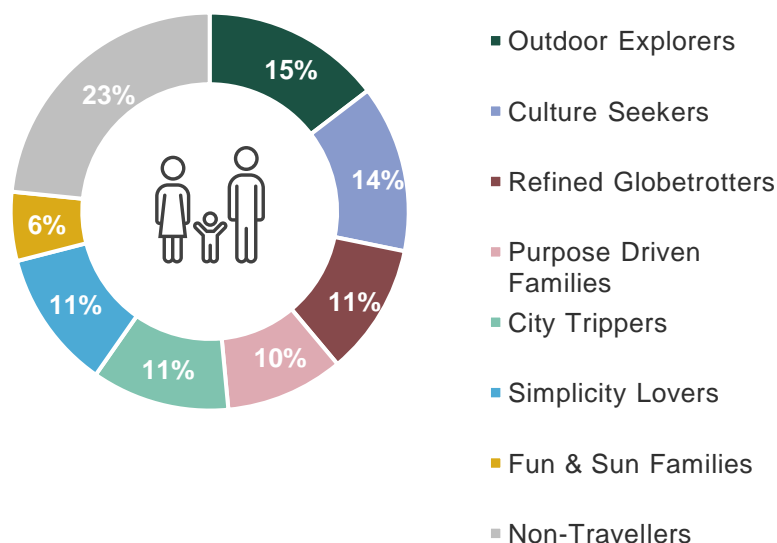
This research on the Mexican market is focused on travellers with **Socio-Economic tier of A, B, & C+**.

Amongst these Mexican travellers, there is a strong overindex for Purpose Driven Families as well as Fun & Sun Families compared to other markets, however the most common segments are Outdoor Explorers and Culture Seekers.

Travellers from Mexico are often interested in destinations that feel familiar and fun, and are more likely than other markets to be interested in exploring family-focused attractions, nightlife, and guided tours.

MARKET SIZING

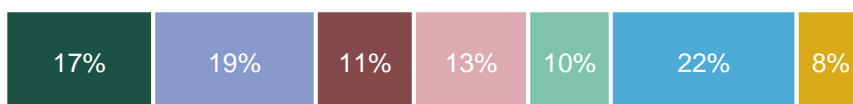
POPULATION BREAKDOWN



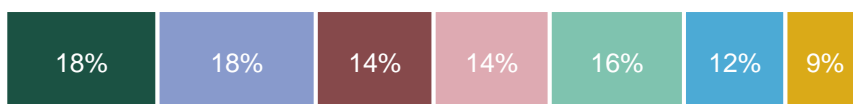
24.4% of the adult population in Mexico (est. 10M) are non-travellers (est. 2M). Reasons for not travelling are often financial or related to inability to travel due to commitments and limited vacation time.

OUTBOUND TRAVELLERS' BREAKDOWN

Short-haul Travellers



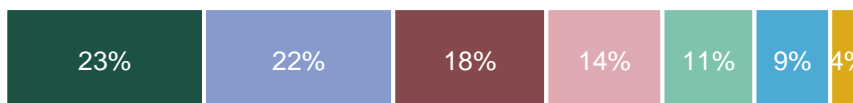
Mid-haul Travellers



Long-haul Travellers



Travellers To Canada



! 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	1.5M	No	<ul style="list-style-type: none"> ○ Nature Experiences ○ Overnight Experiences ○ High-Intensity Sports 	<ul style="list-style-type: none"> ○ Adventure ○ Novel & Authentic ○ Connections
 CULTURE SEEKERS	1.3M	No	<ul style="list-style-type: none"> ○ Cultural Experiences & Attractions ○ Festivals & Events ○ Nightlife 	<ul style="list-style-type: none"> ○ Connections ○ Security ○ Familiarity
 REFINED GLOBETROTTERS	1.1M	Yes	<ul style="list-style-type: none"> ○ Cultural Experiences & Attractions ○ Cuisine ○ Guided Tours 	<ul style="list-style-type: none"> ○ Novel & Authentic ○ Bonding ○ Escape & Relax
 PURPOSE DRIVEN FAMILIES	0.9M	No	<ul style="list-style-type: none"> ○ Family-Focused Attractions ○ Cultural Experiences & Attractions ○ Nature Experiences 	<ul style="list-style-type: none"> ○ Novel & Authentic ○ Bonding ○ Adventure
 CITY TRIPPERS	1.2M	No	<ul style="list-style-type: none"> ○ Shopping ○ Nightlife ○ Cultural Experiences & Attractions 	<ul style="list-style-type: none"> ○ Fun ○ Novel & Authentic ○ Escape & Relax
 SIMPLICITY LOVERS	1.1M	No	<ul style="list-style-type: none"> ○ Family-Focused Attractions ○ Cultural Experiences & Attractions ○ Nature Experiences 	<ul style="list-style-type: none"> ○ Escape & Relax ○ Fun ○ Simplicity
 FUN & SUN FAMILIES	0.5M	No	<ul style="list-style-type: none"> ○ Family-Focused Attractions ○ Shopping ○ Nature Experiences 	<ul style="list-style-type: none"> ○ Fun ○ Bonding ○ Escape & Relax

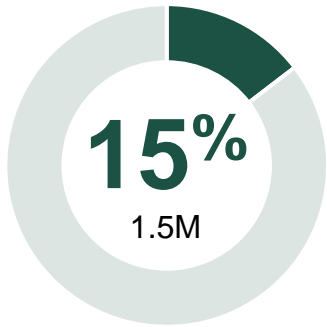
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- **DESTINATION CANADA PRIORITY SEGMENT** – Traveler segments prioritized by Destination Canada for targeted marketing and strategic efforts due to the opportunity they provide to contribute significantly to the Canadian tourism landscape. Aligning 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 MEXICO POPULATION

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

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

WHAT YOU NEED TO KNOW ABOUT ME

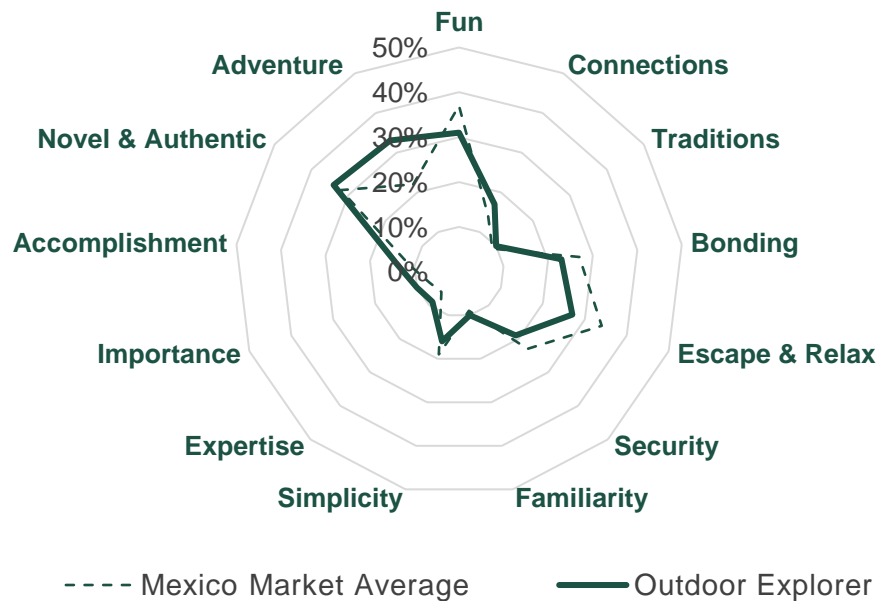
1 We love travel and take all types of trips (domestic / international / business / bleisure).

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

3 As young parents, and value travel as a way to demonstrate success and provide opportunities to our family.

4 Exploration, learning from local communities, and adventure are priorities, and we like to use travel agents to help us plan the best trips.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

116

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

110

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 prioritize unexplored travel, engaging with local communities for personal growth.
- We're motivated by adventures that challenge us, taking pride in the feeling of accomplishment as a way to communicate our success.
- We prioritize natural, adventurous, free-spirited, and unexplored destinations.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	86%	125
I'm always on the look out for new destinations to visit next	85%	122
I like my holiday to have some form of physical activity	81%	142
I am more likely to select destinations / activities that invest in socially responsible tourism	78%	121
I'm passionate about travelling	76%	114
I generally think natural attractions are the highlights of my trip	71%	147
I go where I want to go, no matter the hurdles	67%	131
I learn the basics of a language before visiting a country / region	67%	124
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	66%	134
I feel best on vacation when being highly active	58%	128
I'm open to unconventional accommodations when travelling	55%	133
I seek out destinations where I can explore my ancestral heritage	51%	120
I'd be open to using AI-powered chatbots for travel planning and assistance	46%	127



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel a sense of adventure	38%	140
To be proud to share my travel experiences	27%	131
To push my limits and challenge myself	18%	137
To feel connected with new people	17%	112
To feel like I'm important	10%	120
To feel like a travel expert	9%	124



DESIRED DESTINATION

	SCORE	INDEX
Adventurous	63%	147
Fun	49%	100
Authentic	29%	103
Free-Spirited	29%	140
Unexplored	19%	151
Passionate	17%	110



OUTDOOR EXPLORERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

- We are under 35 years of age with at least one child.
- We are working full time or still finishing post secondary education.
- Find us in the Mexico City Metropolitan Area.



AGE

	SCORE	INDEX
18-34	50%	127
35-54	39%	88
55+	11%	82
MEAN YEARS	37.0	75



HH INCOME (CAD)*

	SCORE	INDEX
Less than \$900	21%	100
\$900 to <\$6K	66%	101
\$6K or more	10%	106
Refused	3%	74

* HH Income reported by month



EMPLOYMENT

	SCORE	INDEX
Employed FT	64%	114
Employed PT	13%	115
Self-employed	13%	89
Retired	2%	80



EDUCATION

	SCORE	INDEX
Primary education or less	0%	74
Secondary education	3%	85
Post-secondary education	97%	112



73%
103 Have a valid passport



GENDER

50% 98 Male

50% 101 Female

0% 108 Non-binary / Other



HOUSEHOLD

71% 105 Children <18 Living At Home*

11% 82 Children 18+ Living At Home*

3% 84 Children NOT Living At Home*

27% 97 No Children

* Option is not exclusive



MEXICO REGION BREAKOUT

	SCORE	INDEX
Mexico City Metropolitan Area	22%	103
South	19%	107
Northeast	17%	88
Centre-West	17%	99
Centre-East	15%	88
Northwest	11%	108



SOCIO-ECONOMIC LEVEL

	SCORE	INDEX
A / B	51%	95
C+	49%	105



OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS



TRAVEL TRADE INDEX: NON-GROUP

117

TRAVEL TRADE INDEX: GROUP

118

! KEY terminology on this page

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

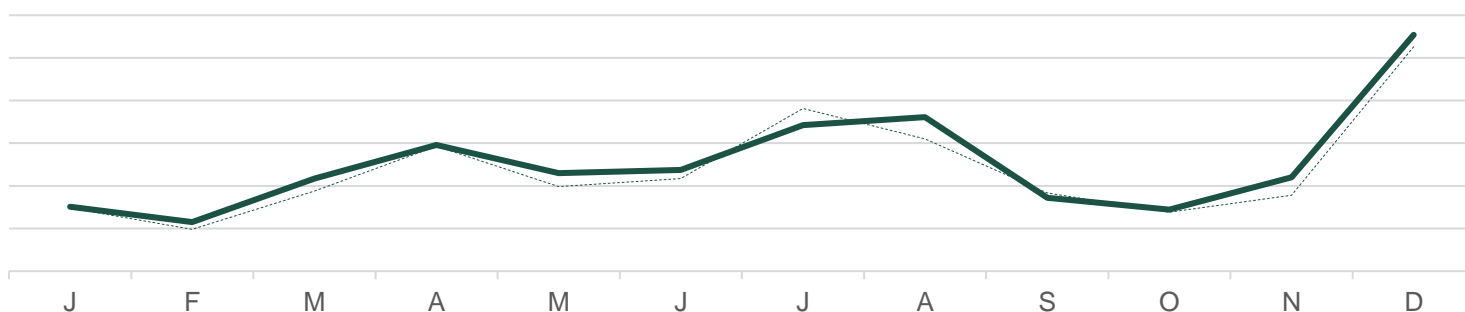
For additional definitions see [Glossary](#)



TYPICAL TRAVEL MONTHS

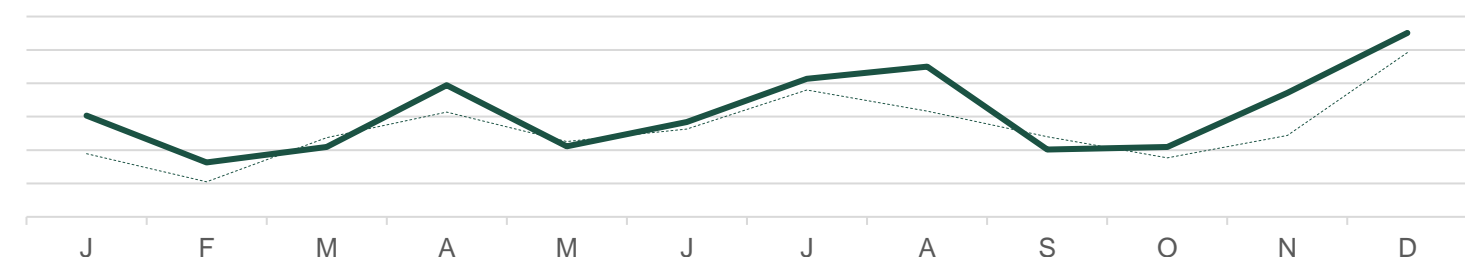
For Flights of 3–7 Hours

— Outdoor Explorer
 Market Average



For Flights of 7+ Hours

— Outdoor Explorer
 Market Average



TRIP DURATION

INDEX

1-2 Days	40%	106
3-5 Days	32%	104
1 Week Holiday	28%	116
2 Weeks Holiday	18%	118
3 Weeks Or More	14%	125

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	49%	94
International Leisure	20%	115
Business Trip	28%	110
Added Personal To Business	20%	114
Worked During Vacation	19%	115

Incidence is frequency of 2+ times per year



OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	50%	97
Vacation Rental (e.g., Airbnb, Vrbo)	26%	99
Premium Hotel	24%	96
All-inclusive resort	19%	93
Friend's or family's place	19%	86
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	10%	133



THOUGHTS ON INDIGENOUS TRAVEL

67%

120 INDEX SCORE

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

10%

90 INDEX SCORE

Strong Interest In Indigenous Activities



WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I'm willing to put in the effort while travelling in order to see lesser-known places	78%	134
I like to explore places that are off the beaten path and less explored	73%	136
You only ever get to know a country by experiencing its culture	71%	74
I really want to learn about the history of the destinations I visit	70%	86
I'm open to visiting destinations with challenging climates or weather conditions	56%	129
I'm open to travelling to destinations with limited tourist infrastructure	52%	128



OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

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



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	63%	90
Kids	39%	96
Adult relatives	22%	83
Solo	12%	118
Friends	8%	102



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$3,210

108
INDEX SCORE

SPEND STYLE

Premium / Upscale



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	65%	123
It's important for me to know that the money I spend will support the local economy I'm visiting	63%	115
I consider the impact that I personally have on the destinations I visit	61%	106
It's important to me that I visit somewhere that is open to diversity and inclusion	56%	102
Hearing from underrepresented communities is an important part of travelling	56%	112

82%

PRIORITIZE SUSTAINABLE TRAVEL

121 INDEX SCORE

! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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



OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES



OVERALL INSIGHT

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



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	64%	139
○ Nature walks	32%	145
○ Visiting nature parks or preserves	25%	135
○ See or explore lakes, rivers, or waterfalls	24%	140
Water-based sports	20%	139
○ Swimming	14%	137
○ Kayaking, canoeing, or paddle-boarding	8%	146
High-intensity sports	16%	147
○ Rock climbing	8%	148
○ Bungee jumping or skydiving	6%	151
Casual sports	12%	130
○ Ziplining	5%	134
○ Fishing	5%	135
Winter-based sports	11%	131
○ Snowmobiling	3%	125
○ Dog-sledding	2%	121
Family-focused attractions	47%	85
Cultural experiences or attractions	45%	57
Guided tours	35%	94
Overnight experiences	30%	113
Shopping	29%	60
Festivals and events	28%	98
Local cuisine	24%	56



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	65%	97	50%	67
To spend time with family	47%	85	53%	105
To escape from routine	34%	58	38%	98
For adventure and excitement	37%	129	45%	129
To learn through other cultures	27%	93	39%	97
To have memories from top travel spots	16%	133	10%	97
To have fun with friends	15%	126	14%	103
For personal reflection and growth	18%	121	16%	134
For a romantic getaway	13%	107	12%	96



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	51%	77	54%	94
Family / friends wanted to go	26%	83	29%	100
Visiting friends / family	30%	89	36%	103
Kids wanted to go	40%	95	41%	99
Festival or event	25%	103	26%	104
Special event (e.g., wedding, reunion)	24%	83	28%	92

51% 101
INDEX SCORE

Travel aligns with children’s school schedule

43% 113
INDEX SCORE

Take time off for vacation during major holidays

28% 100
INDEX SCORE

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



OUTDOOR EXPLORERS

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

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

73%

Primary Trip Planner

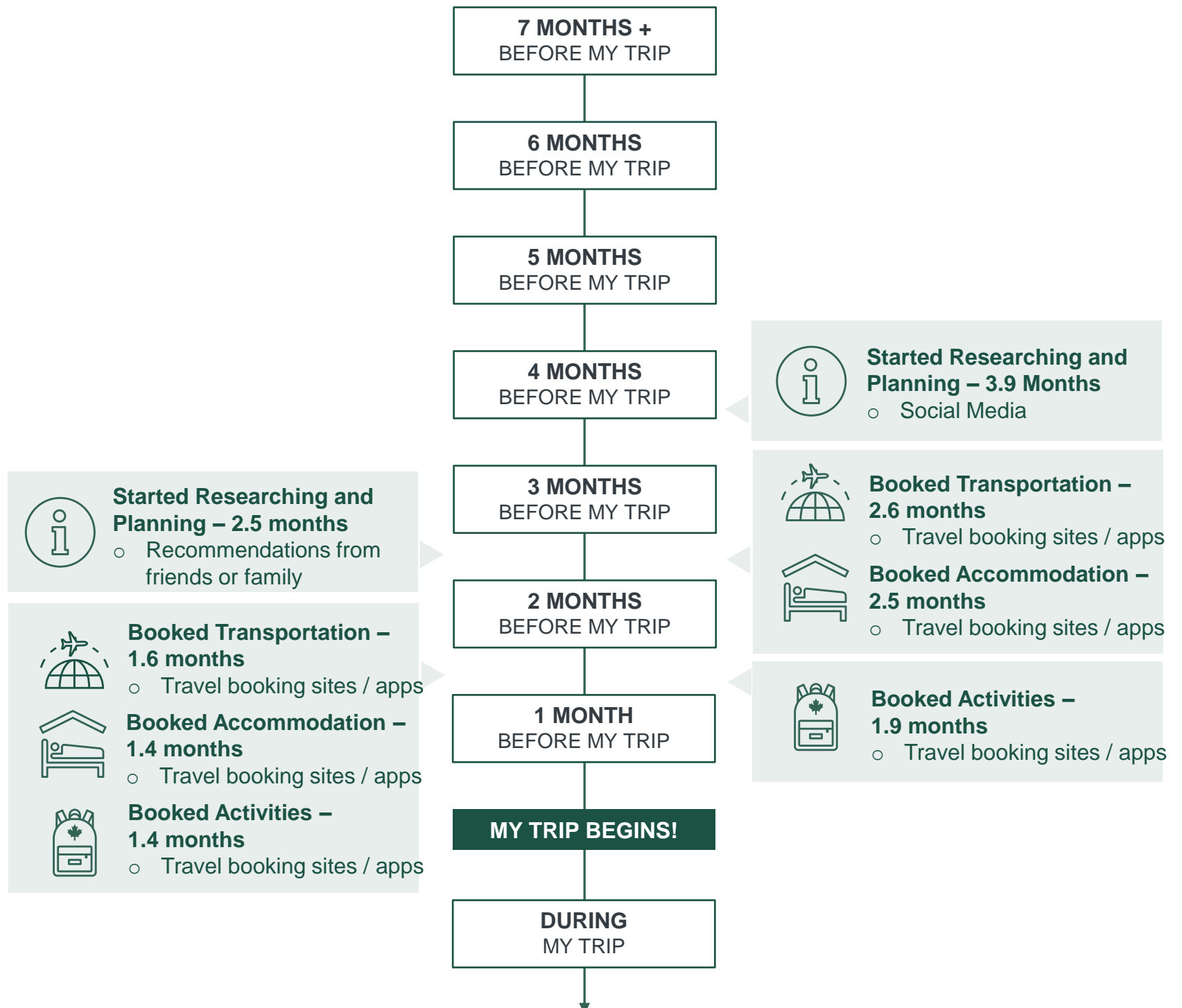
113 INDEX SCORE

! 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





OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

- Our top trips are to adventure and nature destinations.
- At times we take trips like Culture Seekers or City Trippers.

! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

12% 89 INDEX SCORE



TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre	20%	
	Small cities & town	15%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Adventure
	Bars and pubs		30%
	Camping		12%
ACTIVITIES	Meditation or yoga		9%
	KEY BEHAVIOURS: Planning fairly last minute, in pursuit of personal growth		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

7% 101 INDEX SCORE



TRIP TYPE	Eco-Tourism Spot		
COMPANIONS	Couple only	31%	
	Nuclear family with kids	29%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Novel & Authentic
	Zoos or aquariums		33%
	Nature walks		29%
ACTIVITIES	Visiting nature parks or preserves		28%
	KEY BEHAVIOURS: Seeking novel and unique access to nature, likely staying in a vacation rental		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

9% 112 INDEX SCORE



TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	35%	
	Fun	Escape & Relax	Novel & Authentic
ACTIVITIES	Historical or archeological sites		28%
	Museums		26%
	Visiting local monuments		22%
KEY BEHAVIOURS	Couples trip to really immerse in and learn about a new culture		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

28% 125 INDEX SCORE



TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban centre	29%	
	Beach resort	24%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
	Local Restaurants		40%
	Bars and pubs		39%
ACTIVITIES	Souvenir shopping		36%
	KEY BEHAVIOURS: A romantic getaway focussed on fun		



OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- We will travel in all seasons, but more likely in the Spring, which aligns with a major holiday.
- If we have visited, it's been 1-2 times so far, but planning for more.
- Our knowledge of Canada is fairly strong, and we have done some 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	28%	26%	35%	21%
VS. TOTAL MARKET	30%	22%	35%	22%

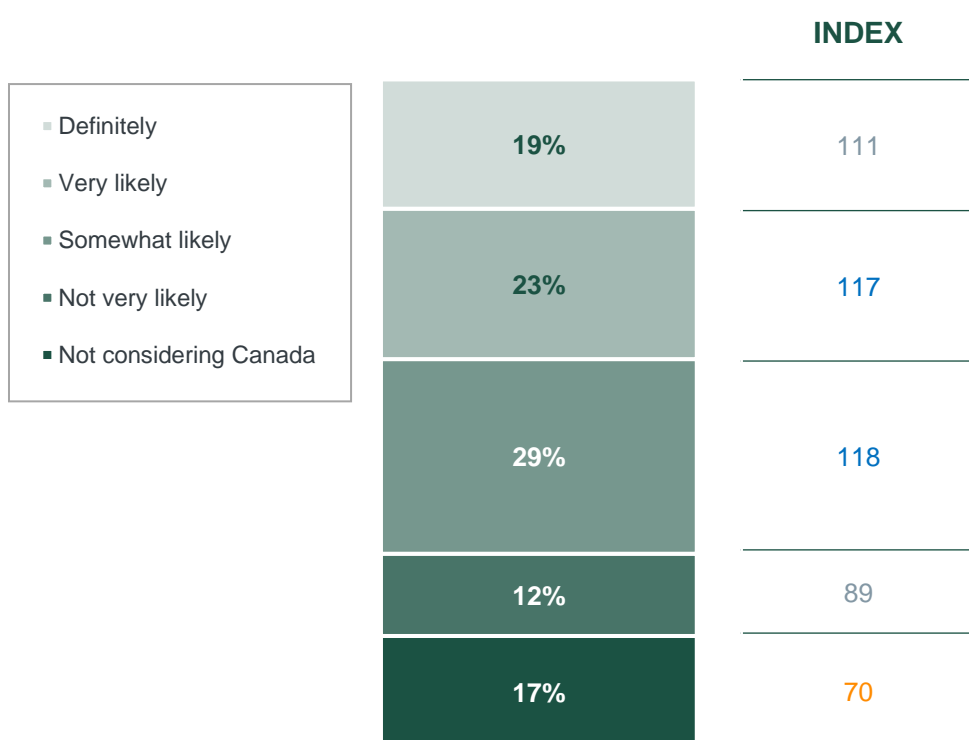
29%

Been to Canada in last 5 years

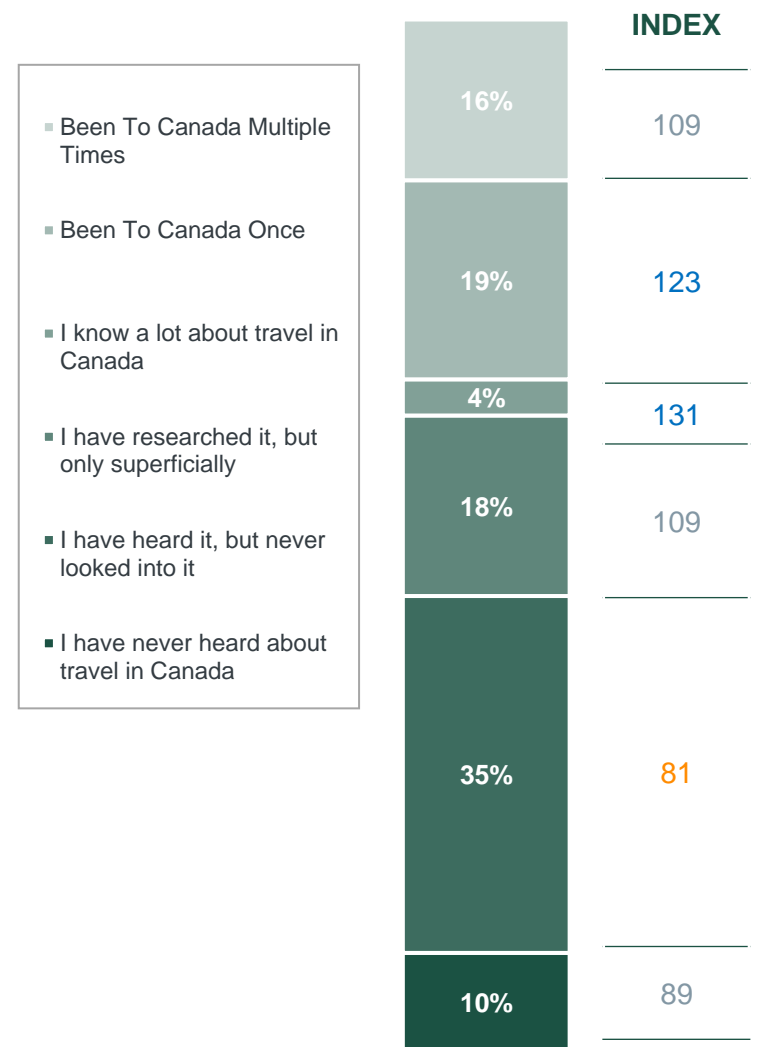
118 INDEX SCORE



LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA





OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

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



MAJOR LIFE EVENTS IN LAST 5 YEARS

15%

Had a child

99 INDEX SCORE

38%

Started a new job / career

131 INDEX SCORE

11%

Bought a new home

109 INDEX SCORE

12%

Moved to a new city

127 INDEX SCORE

17%

Child started school

96 INDEX SCORE

44%

Purchased a car

102 INDEX SCORE

2%

Retired

83 INDEX SCORE

41%

Renovated house

102 INDEX SCORE



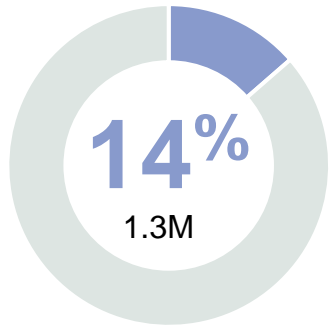
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Personal care and wellness	50%	69
Travel	48%	84
Technology and gadgets	45%	136
Savings and investments	42%	115
Fashion and accessories	30%	111
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	30%	107



CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



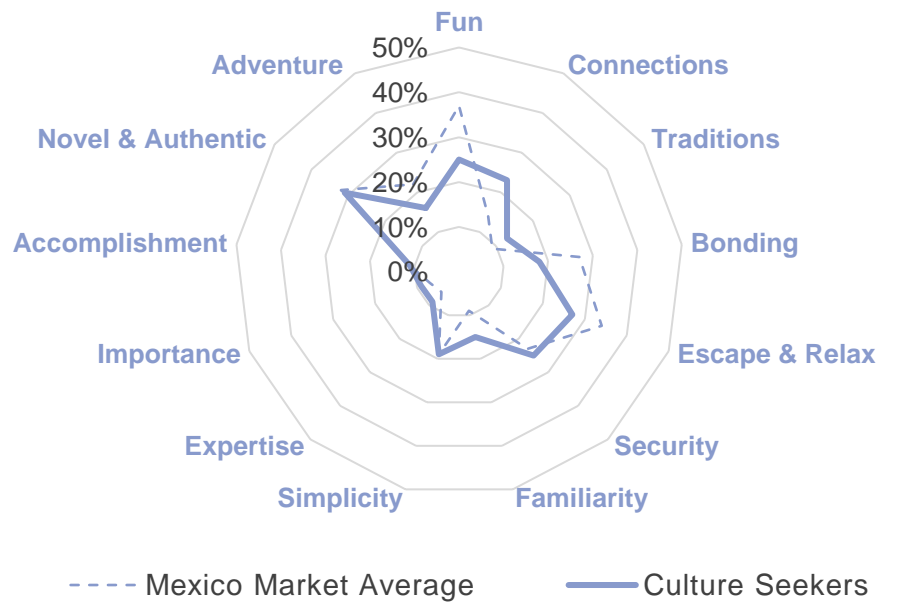
% OF MEXICO POPULATION

We are sociable, free-spirited individuals who seek unique, authentic experiences. We thrive on immersing ourselves in new perspectives, local culture, making connections, which boosts our energy and confidence. We prefer vibrant city life, dynamic arts scenes, and culturally rich destinations. We prioritize diversity, inclusion, and sustainability, and open to both short and longer trips. Travel is an investment we make in ourselves.

WHAT YOU NEED TO KNOW ABOUT ME

- 1 We prioritize diversity, inclusion, sustainability and supporting the local economy.
- 2 We like the challenge of a new experience, and aren't afraid of trying something different like unconventional accommodations.
- 3 We try to learn the basics of the language before we travel and learn about the history of the destinations we visit.
- 4 Visiting trendy hotspots help us feel like travel experts among our friends and family.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

124

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

112

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CULTURE SEEKERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



OVERALL INSIGHT

- We seek authentic experiences, embracing new perspectives and connecting with locals.
- We like to become familiar with our surroundings by participating in local traditions.
- We are dedicated to sustainable travel, ensuring we respect and preserve the environment.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm passionate about travelling	73%	107
When there's a lot of positive buzz about a destination it makes me want to visit it more	65%	110
I learn the basics of a language before visiting a country / region	64%	116
I go where I want to go, no matter the hurdles	56%	115
I seek out destinations where I can explore my ancestral heritage	52%	123
I'm a planner, while travelling I like to know what comes next	52%	115
I'm open to unconventional accommodations when travelling	48%	116
Even while travelling, I like to maintain regular contact with my duties or obligations back home	47%	148
I enjoy joining guided tours to explore new destinations	47%	120
When traveling, I expect 24 / 7 support from a travel provider	44%	131
I seek out destinations that offer quiet opportunities for deep self-reflection	42%	111
I like to keep my travel plans flexible and often book on short notice	38%	124
Local cuisine is not a priority for me; I focus on other aspects of travel	27%	134



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel welcomed	28%	132
To feel connected with new people	23%	136
To be familiar with my surroundings	18%	130
To feel like a local	13%	136
To create new, or take part in old, traditions	13%	135
To feel like a travel expert	9%	124



DESIRED DESTINATION

	SCORE	INDEX
Authentic	35%	128
Open	27%	134
Unique	26%	117
Caring	23%	137
Passionate	22%	129
Accepting	15%	134



CULTURE SEEKERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

- We represent a diverse age range, and many of us have teenage (or older) children.
- We're generally employed full-time.
- We're most likely to be found outside metropolitan areas.



AGE

	SCORE	INDEX
18-34	44%	113
35-54	42%	98
55+	13%	88
MEAN YEARS	38.3	85



HH INCOME (CAD)*

	SCORE	INDEX
Less than \$900	21%	99
\$900 to <\$6K	67%	108
\$6K or more	9%	101
Refused	3%	79

* HH Income reported by month



EMPLOYMENT

	SCORE	INDEX
Employed FT	65%	119
Employed PT	11%	99
Self-employed	13%	89
Retired	3%	89



EDUCATION

	SCORE	INDEX
Primary education or less	1%	140
Secondary education	6%	117
Post-secondary education	94%	80



80%

118 Have a valid passport



GENDER

52%

115 Male

47%

85 Female

0%

100 Non-binary / Other



HOUSEHOLD

64%

97 Children <18 Living At Home*

16%

100 Children 18+ Living At Home*

4%

92 Children NOT Living At Home*

32%

105 No Children

* Option is not exclusive



MEXICO REGION BREAKOUT

	SCORE	INDEX
Northeast	22%	147
Mexico City Metropolitan Area	21%	93
Centre-East	17%	120
South	15%	86
Centre-West	15%	78
Northwest	10%	103



SOCIO-ECONOMIC LEVEL

	SCORE	INDEX
A / B	52%	100
C+	48%	100



CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: NON-GROUP

104

TRAVEL TRADE INDEX: GROUP

101

! KEY terminology on this page

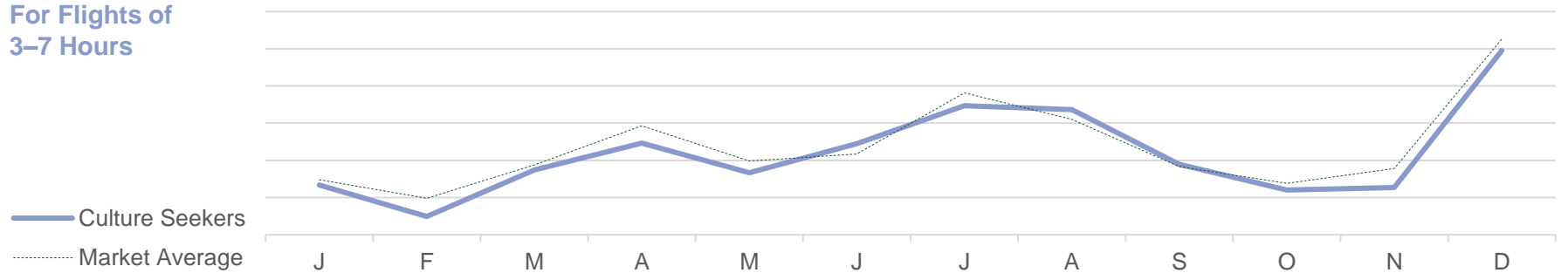
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **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](#)

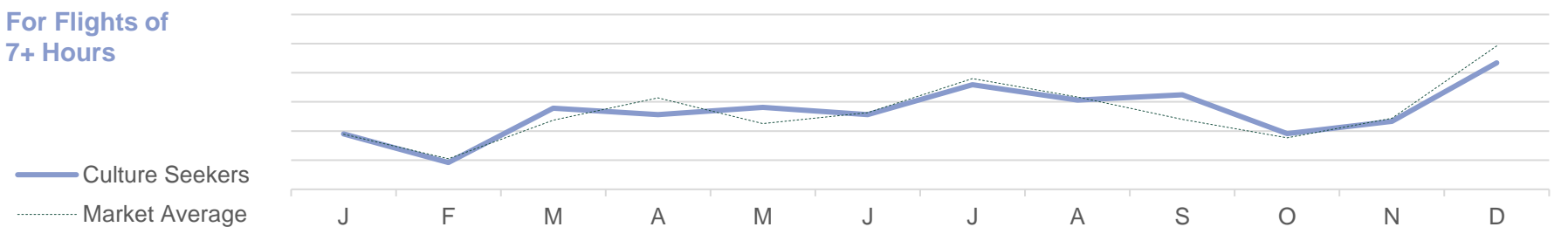


TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

INDEX

Duration	Percentage	Index
1-2 Days	38%	93
3-5 Days	31%	100
1 Week Holiday	27%	113
2 Weeks Holiday	19%	123
3 Weeks Or More	14%	125

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Trip Type	Percentage	Index
Domestic Leisure	46%	84
International Leisure	23%	125
Business Trip	30%	115
Added Personal To Business	24%	129
Worked During Vacation	22%	127

Incidence is frequency of 2+ times per year



CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	54%	106
Vacation Rental (e.g., Airbnb, Vrbo)	27%	110
Premium Hotel	24%	97
Friend's or family's place	22%	95
All-inclusive resort	16%	80
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	8%	112



THOUGHTS ON INDIGENOUS TRAVEL

67%

118 INDEX SCORE

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

12%

104 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	78%	116
You only ever get to know a country by experiencing its culture	73%	91
I'm willing to put in the effort while travelling in order to see lesser-known places	65%	111
I like to explore places that are off the beaten path and less explored	59%	114
I'm open to visiting destinations with challenging climates or weather conditions	53%	121
I'm open to travelling to destinations with limited tourist infrastructure	50%	122



CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

- We travel as a couple and also with our kids.
- Our budgets are usually mid-ranged, but can splurge on an experience.



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	60%	83
Kids	34%	90
Adult relatives	25%	93
Solo	14%	131
Friends	9%	104



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$3,000

101
INDEX SCORE

SPEND STYLE

Premium / Upscale



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	77%	140
Hearing from underrepresented communities is an important part of travelling	69%	135
I consider the impact that I personally have on the destinations I visit	68%	125
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	64%	119
It's important for me to know that the money I spend will support the local economy I'm visiting	62%	108

82%

PRIORITIZE SUSTAINABLE TRAVEL

123 INDEX SCORE

! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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



CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES















OVERALL INSIGHT

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



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Cultural experiences or attractions	58%	111
○ Museums	37%	99
○ Art galleries	23%	123
○ History or culture lessons	13%	122
 Festivals and events	40%	135
○ Music concerts or festivals	23%	130
○ Cultural or traditional festivals	19%	130
 Casual sports	11%	127
○ Road cycling	3%	125
○ Ziplining	4%	108
 High-intensity sports	9%	111
○ Mountain biking	5%	120
○ Whitewater rafting	3%	139
 Winter-based sports	9%	117
○ Snowshoeing or cross-country skiing	4%	132
○ Ice skating or hockey	4%	134
 Shopping	43%	95
 Family-focused attractions	39%	72
 Local cuisine	40%	103
 Nature experiences	36%	70
 Guided tours	33%	75
 Nightlife	32%	111
 Overnight experiences	25%	94



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 spend time with family	48%	87	42%	87
To relax and unwind	62%	88	54%	84
To escape from routine	49%	126	39%	100
To learn through other cultures	31%	103	52%	130
For adventure and excitement	25%	84	21%	76
To have fun with friends	10%	101	16%	112
For personal reflection and growth	14%	108	14%	115
For a romantic getaway	12%	93	10%	83
To check off dream travel places	6%	87	17%	118



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3-7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	55%	85	39%	66
Visiting friends / family	36%	115	37%	105
Family / friends wanted to go	33%	134	41%	127
Special event (e.g., wedding, reunion)	39%	138	35%	121
Kids wanted to go	34%	84	27%	85
Festival or event	31%	121	30%	113

50% 99 INDEX SCORE

Travel aligns with children's school schedule

49% 137 INDEX SCORE

Take time off for vacation during major holidays

36% 140 INDEX SCORE

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



CULTURE SEEKERS

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

- We generally book about 1-2 months in advance, even for long-haul trips, taking inspiration and influence from social media and online resources.

78%

Primary Trip Planner

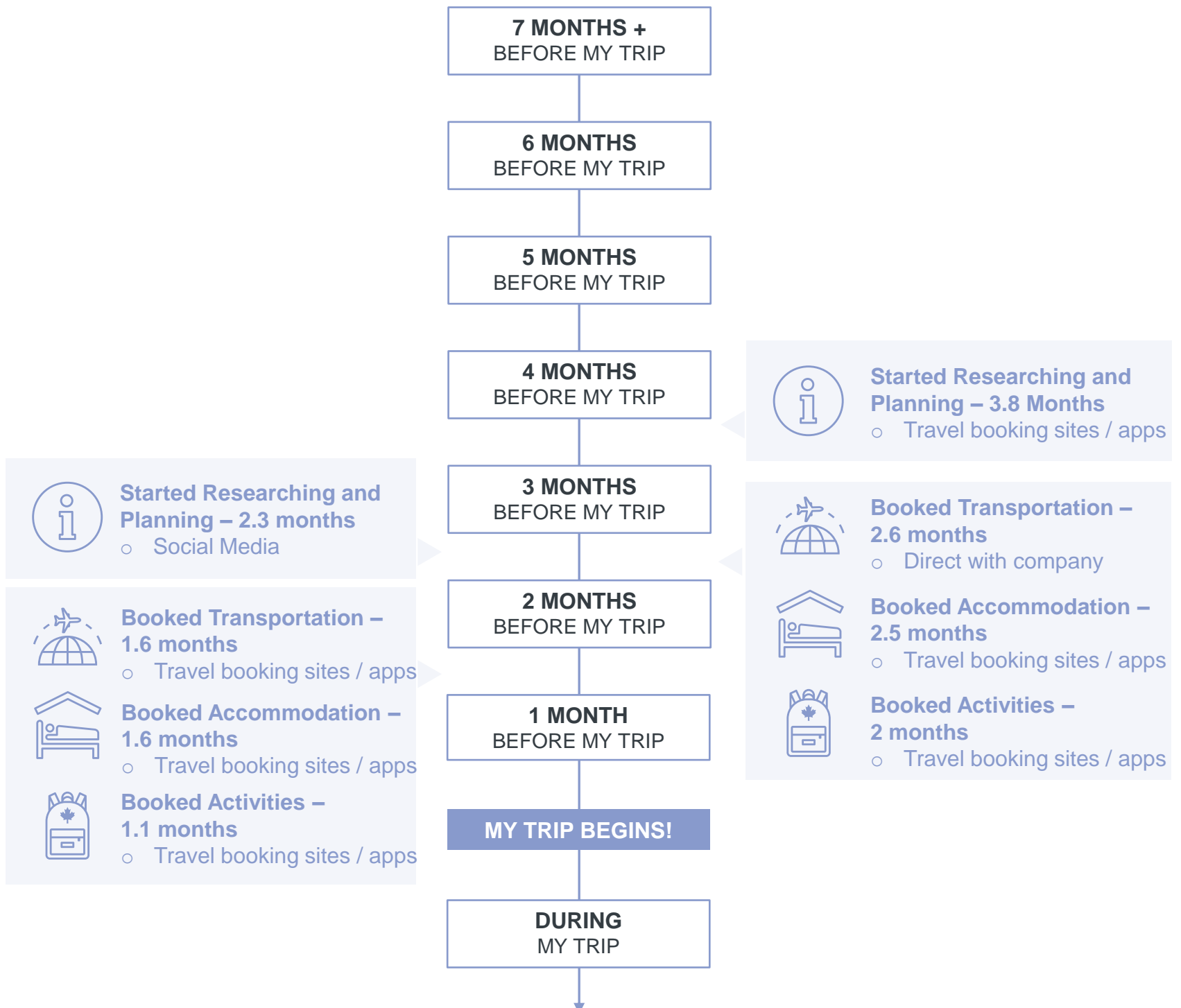
125
INDEX SCORE

! 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





CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

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

! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

12% ¹²⁶ INDEX SCORE



TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		35%
	Nuclear family with kids		22%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Novel & Authentic
	Local restaurants		34%
	Historical or archeological sites		28%
ACTIVITIES	Museums		26%
	KEY BEHAVIOURS: Authentic experience, immersed in a new culture. Planned well in advance		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

18% ¹⁶⁰ INDEX SCORE



TRIP TYPE	Urban Centre		
COMPANIONS	Extended family		23%
	Nuclear family with kids		22%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Security
	Visiting famous shopping centres		32%
	Bars and pubs		32%
ACTIVITIES	Zoos or aquariums		24%
	KEY BEHAVIOURS: Larger travel group, trendy destination, vacation rental		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

14% ⁹³ INDEX SCORE



TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		29%
	Cultural experience		12%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Adventure
	Bars and pubs		39%
	Local restaurants		18%
ACTIVITIES	Souvenir shopping		18%
	KEY BEHAVIOURS: Planned last minute, taking time to enjoy an energetic city with vibrant nightlife		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

28% ¹²⁷ INDEX SCORE



TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		20%
	Fun	Escape & Relax	Novel & Authentic
TRIP EMOTIONAL MOTIVATIONS	Local restaurants		35%
	Visiting local monuments		28%
	City tours		19%
KEY BEHAVIOURS	Romantic getaway, higher budget, likely an all-inclusive resort		



CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

- We seek rich culture and heritage, with a variety of museums and historical sites.
- Many of us travel within Mexico and we also visit other Spanish speaking countries like Columbia and Spain.



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Mexico	47%	80	Colombia	3%	125
US	16%	120	France	3%	97
Spain	6%	110	Italy	3%	106
Canada	5%	111	Cuba	2%	128
Brazil	4%	149	Japan	2%	104



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is inclusive and tolerant	30%	142
Provides a variety of local festivals and events	29%	141
Offers an energetic and dynamic cultural scene	27%	136
Has a thriving arts and music scene	25%	148
Has vibrant nightlife and entertainment	24%	125
Has many hidden gems	16%	124
Offers an eccentric and unique atmosphere	16%	130
Has a small town feel	15%	122



CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- Many of us have never visited Canada. Those that have visited have likely only been once.
- Our visits have focused on Ontario, Quebec and the Atlantic.
- A future visit could include Quebec or Toronto.

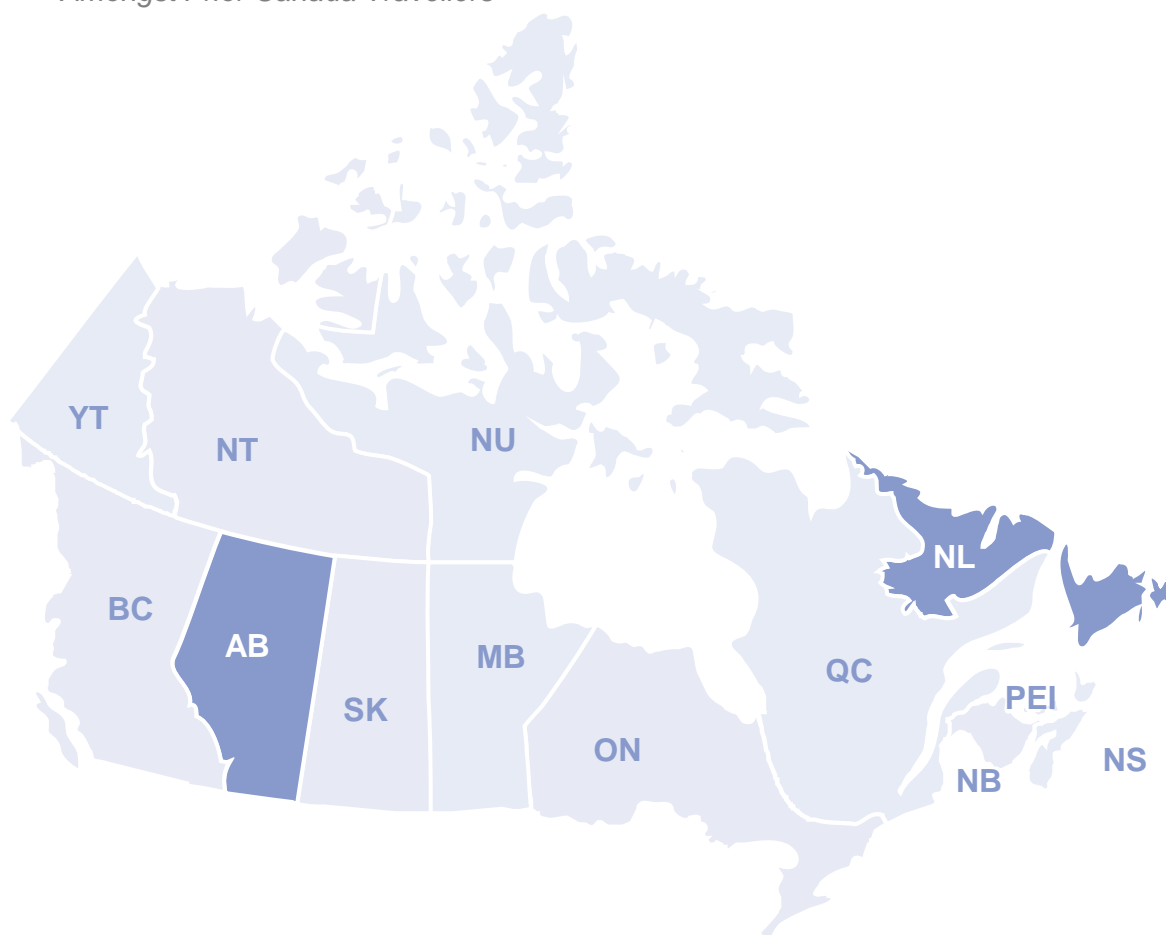


WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	15%	127
BC	17%	94
MB	4%	94
NB	6%	106
NL	8%	129
NS	14%	105
NT	2%	83
NU	4%	104
ON	35%	97
PEI	5%	93
QC	43%	87
SK	3%	107
YT	5%	88



CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- Most travel to Canada has been done during the summer months and some in December.
- A number of us are likely to return to Canada within the next couple of years, especially those who have visited before.
- Overall our consideration is high for visiting Canada.



CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CULTURE SEEKERS	26%	30%	32%	19%
VS. TOTAL MARKET	30%	22%	35%	22%

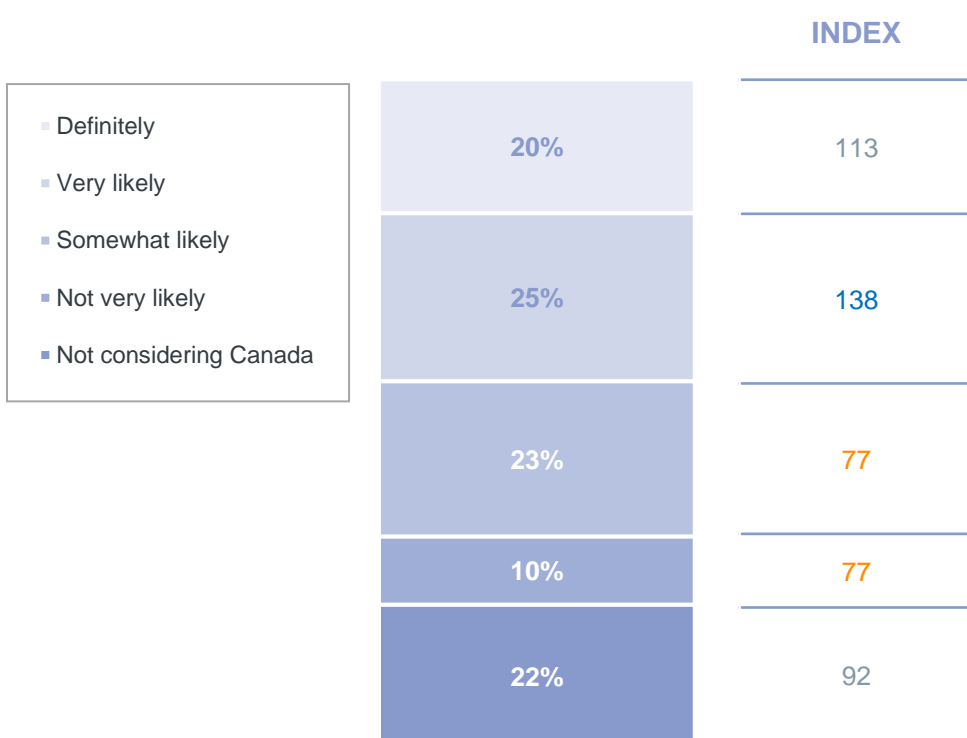
30%

Been to Canada in last 5 years

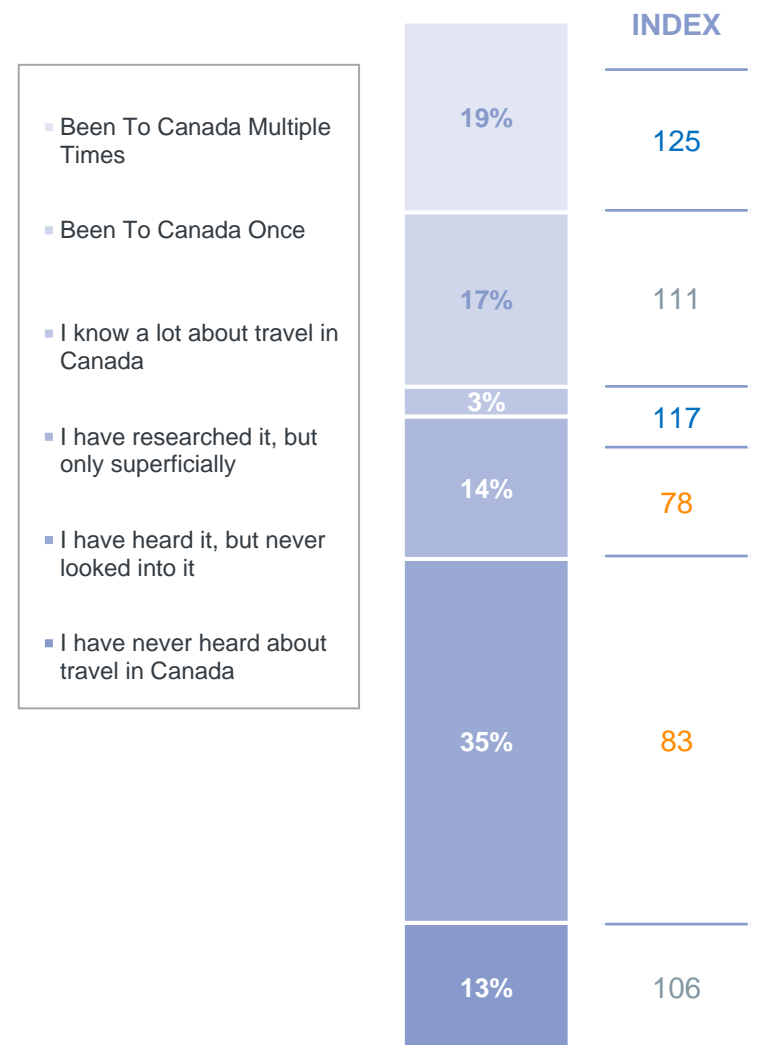
121 INDEX SCORE



LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA





CULTURE SEEKERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

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



MAJOR LIFE EVENTS IN LAST 5 YEARS

14%

Had a child

97 INDEX SCORE

31%

Started a new job / career

104 INDEX SCORE

9%

Bought a new home

93 INDEX SCORE

10%

Moved to a new city

105 INDEX SCORE

18%

Child started school

97 INDEX SCORE

45%

Purchased a car

105 INDEX SCORE

2%

Retired

85 INDEX SCORE

42%

Renovated house

105 INDEX SCORE



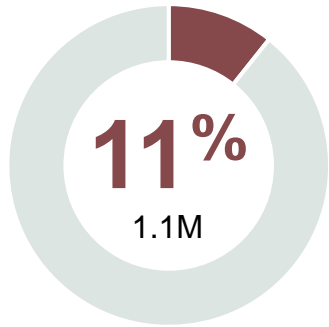
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Personal care and wellness	53%	92
Travel	50%	89
Technology and gadgets	41%	109
Savings and investments	38%	71
Fashion and accessories	30%	108
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	28%	95



REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



% OF MEXICO POPULATION

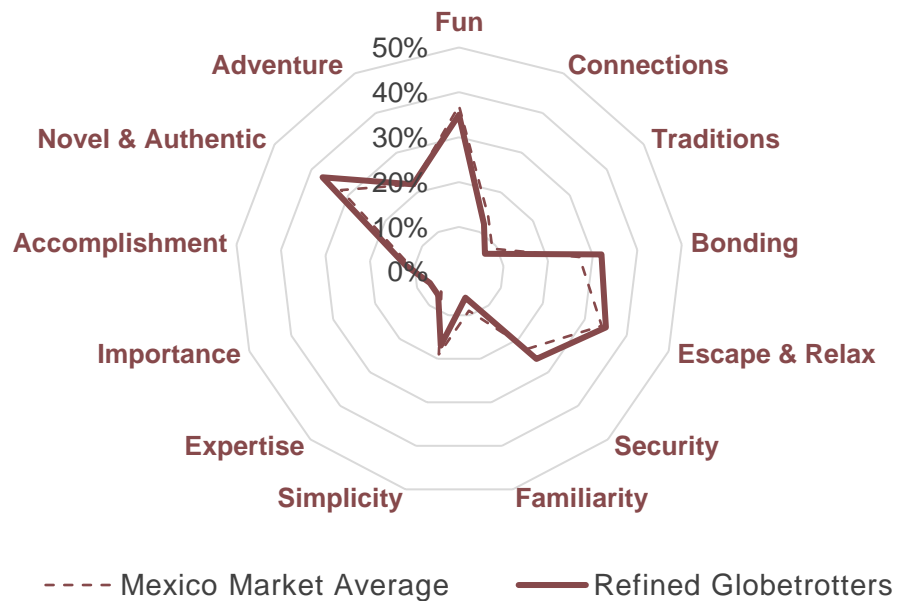
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

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

WHAT YOU NEED TO KNOW ABOUT ME

- 1** Travel is our #1 spending priority.
- 2** Our travel often aligns with major holidays and children’s school holidays.
- 3** We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.
- 4** We use travel and the experiences as a way to bond and connect with each other during the trip.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

97

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

134

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



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm always on the look out for new destinations to visit next	83%	117
I'm passionate about travelling	80%	122
I prefer destinations with well-established tourist infrastructure	69%	129
I learn the basics of a language before visiting a country / region	65%	120
Luxury experiences are an important part of travel	64%	148
I make sure to visit the "famous" sites wherever I go	63%	132
I'm a planner, while travelling I like to know what comes next	57%	143
While I think about value for money, it doesn't tend to influence my choice of destination	56%	140
I seek out fine dining experiences and gourmet cuisine when I travel	52%	143
I enjoy joining guided tours to explore new destinations	50%	139
I tend to not think about my budget too much when travelling	49%	130
I seek travel advice from travel agencies and agents	49%	128
When traveling, I expect 24 / 7 support from a travel provider	44%	129



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	46%	120
To have authentic experiences	38%	114
To share quality time with others	36%	110
To bond through shared experiences	28%	123
To feel safe and secure	28%	130
To feel like I've accomplished something	13%	114



DESIRED DESTINATION

	SCORE	INDEX
Luxurious	32%	156
Authentic	32%	115
World-Class	29%	156
Exclusive	26%	151
Unique	24%	111
Trendy	23%	106



REFINED GLOBETROTTERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

- We are employed full time, earning medium to high incomes.
- Many of us are parents, with multiple children living at home.
- Find us primarily in Mexico City and Guadalajara.



AGE

	SCORE	INDEX
18-34	30%	75
35-54	48%	114
55+	22%	113
MEAN YEARS	43.2	125



HH INCOME (CAD)*

	SCORE	INDEX
Less than \$900	10%	53
\$900 to <\$6K	70%	131
\$6K or more	16%	147
Refused	4%	107

* HH Income reported by month



EMPLOYMENT

	SCORE	INDEX
Employed FT	65%	117
Employed PT	9%	65
Self-employed	13%	88
Retired	5%	120



EDUCATION

	SCORE	INDEX
Primary education or less	0%	74
Secondary education	2%	79
Post-secondary education	98%	122



87%

134 Have a valid passport



GENDER

53%

121 Male

47%

81 Female

0%

75 Non-binary / Other



HOUSEHOLD

60%

92 Children <18 Living At Home*

19%

107 Children 18+ Living At Home*

9%

131 Children NOT Living At Home*

31%

103 No Children

* Option is not exclusive



MEXICO REGION BREAKOUT

	SCORE	INDEX
Mexico City Metropolitan Area	27%	133
Centre-West	22%	146
Northeast	17%	92
Centre-East	14%	80
South	12%	64
Northwest	7%	65



SOCIO-ECONOMIC LEVEL

	SCORE	INDEX
A / B	63%	149
C+	37%	51



REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: NON-GROUP

133

TRAVEL TRADE INDEX: GROUP

122

! KEY terminology on this page

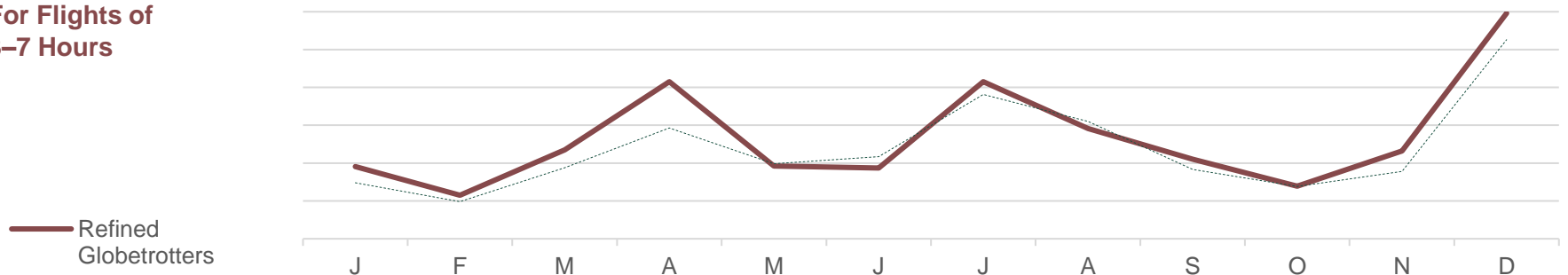
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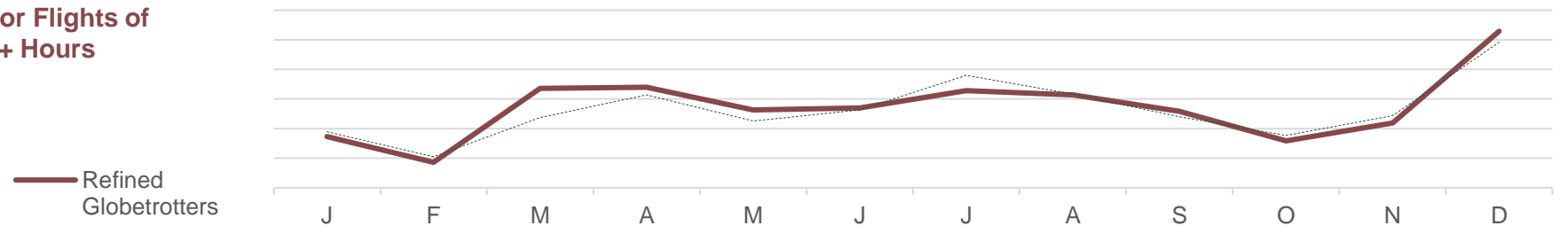


TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

INDEX

1-2 Days	42%	117
3-5 Days	39%	128
1 Week Holiday	31%	126
2 Weeks Holiday	18%	116
3 Weeks Or More	12%	114

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	60%	130
International Leisure	19%	110
Business Trip	35%	128
Added Personal To Business	17%	105
Worked During Vacation	18%	108

Incidence is frequency of 2+ times per year



REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Premium Hotel	46%	152
Mid-priced Hotel	33%	51
All-inclusive resort	31%	140
Vacation Rental (e.g., Airbnb, Vrbo)	25%	89
High-end / Luxury Hotel	12%	146
Friend's or family's place	11%	62



THOUGHTS ON INDIGENOUS TRAVEL

55%

89 INDEX SCORE

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

12%

109 INDEX SCORE

Strong Interest In Indigenous Activities



WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	78%	122
I really want to learn about the history of the destinations I visit	76%	108
I'm willing to put in the effort while travelling in order to see lesser-known places	56%	93
I like to explore places that are off the beaten path and less explored	41%	86
I'm open to visiting destinations with challenging climates or weather conditions	38%	90
I'm open to travelling to destinations with limited tourist infrastructure	31%	71



REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

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



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	76%	121
Kids	35%	91
Adult relatives	24%	91
Friends	8%	98
Solo	6%	81



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$4,230

140
INDEX SCORE

SPEND STYLE

High-end luxury



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	62%	109
I consider the impact that I personally have on the destinations I visit	60%	105
It's important to me that I visit somewhere that is open to diversity and inclusion	50%	91
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	49%	89
Hearing from underrepresented communities is an important part of travelling	42%	89

73%

PRIORITIZE SUSTAINABLE TRAVEL

103 INDEX SCORE

! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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



REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES



OVERALL INSIGHT

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



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	62%	128
○ Historical or archeological sites	44%	145
○ Museums	44%	133
○ Visiting local monuments	33%	144
Local cuisine	51%	135
○ Local restaurants	43%	131
○ Luxury dining	24%	154
Overnight experiences	32%	122
○ Staying at all-inclusive resort	23%	142
○ Cruise	11%	132
Nightlife	32%	111
○ Clubs and dancing	21%	123
○ Casinos	10%	133
Health and wellness	24%	140
○ Spas	18%	145
○ Outdoor hot tub or bath	13%	146
Family-focused attractions	54%	96
Shopping	47%	105
Guided tours	41%	148
Nature experiences	41%	81
Festivals and events	20%	73
Water-based sports	14%	95
Winter-based sports	7%	104



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	64%	94	66%	128
To spend time with family	50%	90	39%	83
To escape from routine	42%	91	36%	94
To learn through other cultures	38%	120	41%	103
For adventure and excitement	23%	77	31%	97
For a romantic getaway	15%	130	16%	119
To have memories from top travel spots	15%	125	9%	93
To have fun with friends	8%	89	14%	105
To check off dream travel places	13%	129	9%	90



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3-7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	69%	122	66%	117
Family / friends wanted to go	28%	95	16%	69
Kids wanted to go	46%	104	39%	97
Visiting friends / family	26%	68	24%	82
Special event (e.g., wedding, reunion)	31%	107	28%	91
Festival or event	24%	99	22%	94

48% 95
INDEX SCORE

Travel aligns with children's school schedule

40% 104
INDEX SCORE

Take time off for vacation during major holidays

23% 68
INDEX SCORE

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



REFINED GLOBETROTTERS

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

- We research a couple months before booking long-haul trips, but research and book closer together for shorter distance trips.

76%

Primary Trip Planner

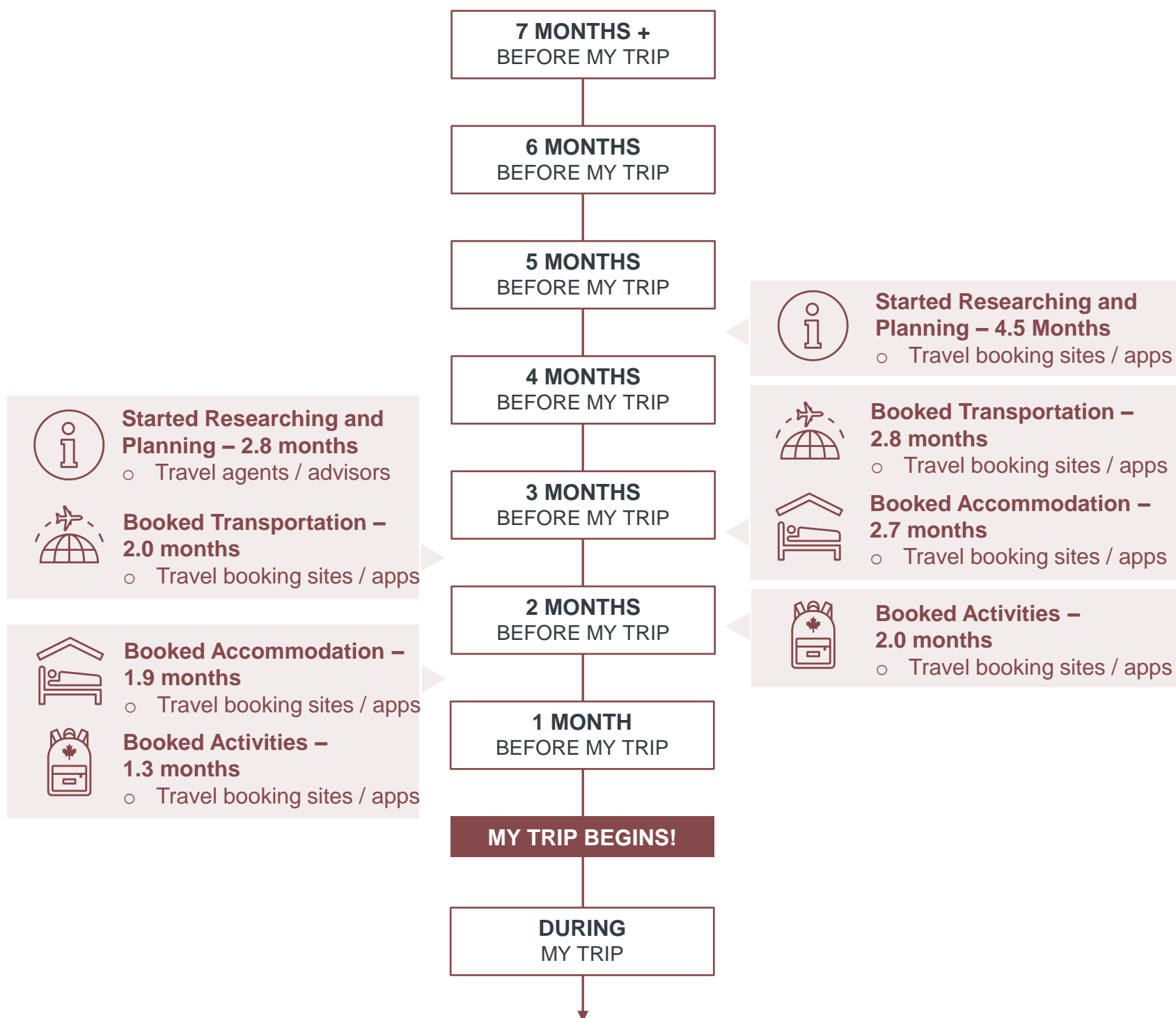
119 INDEX SCORE

! 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





REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

- Our top trips explore cities, beaches, and premium experiences.
- We also take trips like Culture Seekers.

! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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

% OF TOTAL TRIPS

37% 136 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort	20%	
	Urban centre	18%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Novel & Authentic
	Local restaurants		35%
	Visiting local monuments		28%
ACTIVITIES	Souvenir shopping		23%
	KEY BEHAVIOURS		
Romantic getaway to see some well-known attractions and indulge a little			

% OF TOTAL TRIPS

24% 167 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Beach Resort		
COMPANIONS	Extended family	36%	
	Couple only	31%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Fun	Escape & Relax
	Local restaurants		40%
	Oceanside beaches		30%
ACTIVITIES	Souvenir shopping		28%
	KEY BEHAVIOURS		
A reliable all-inclusive family trip, focussed on relaxation			

% OF TOTAL TRIPS

9% 109 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Luxury Resort		
COMPANIONS	Couple only	31%	
	Nuclear family with kids	29%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Fun	Escape & Relax
	Casinos		28%
	Luxury shopping		27%
ACTIVITIES	Luxury dining		23%
	KEY BEHAVIOURS		
Seeking world-class premium experiences. Many activities and nightlife			

% OF TOTAL TRIPS

10% 112 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	35%	
	Fun	Escape & Relax	Novel & Authentic
TRIP EMOTIONAL MOTIVATIONS	Local restaurants		34%
	Historical or archeological sites		28%
	Cultural or traditional festivals		16%
ACTIVITIES	KEY BEHAVIOURS		
	Seeking opportunities to immerse and learn from new cultures		



REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

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



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Mexico	46%	77	Italy	4%	132
US	18%	139	UK	3%	135
Spain	7%	131	Germany	3%	134
France	6%	139	Japan	2%	140
Canada	5%	111	Colombia	2%	94



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Offers all-inclusive resort packages	42%	140
Has a rich cultural and historical heritage	41%	133
Renowned for food and drink experiences	41%	149
Has a variety of museums and / or historical sites	36%	135
Provide access to unique natural wonders	35%	119
Has luxury dining, shopping, and accommodations	33%	147
Has packaged holiday / vacation offers	31%	124
Has well-developed tourism infrastructure	30%	147



REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

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

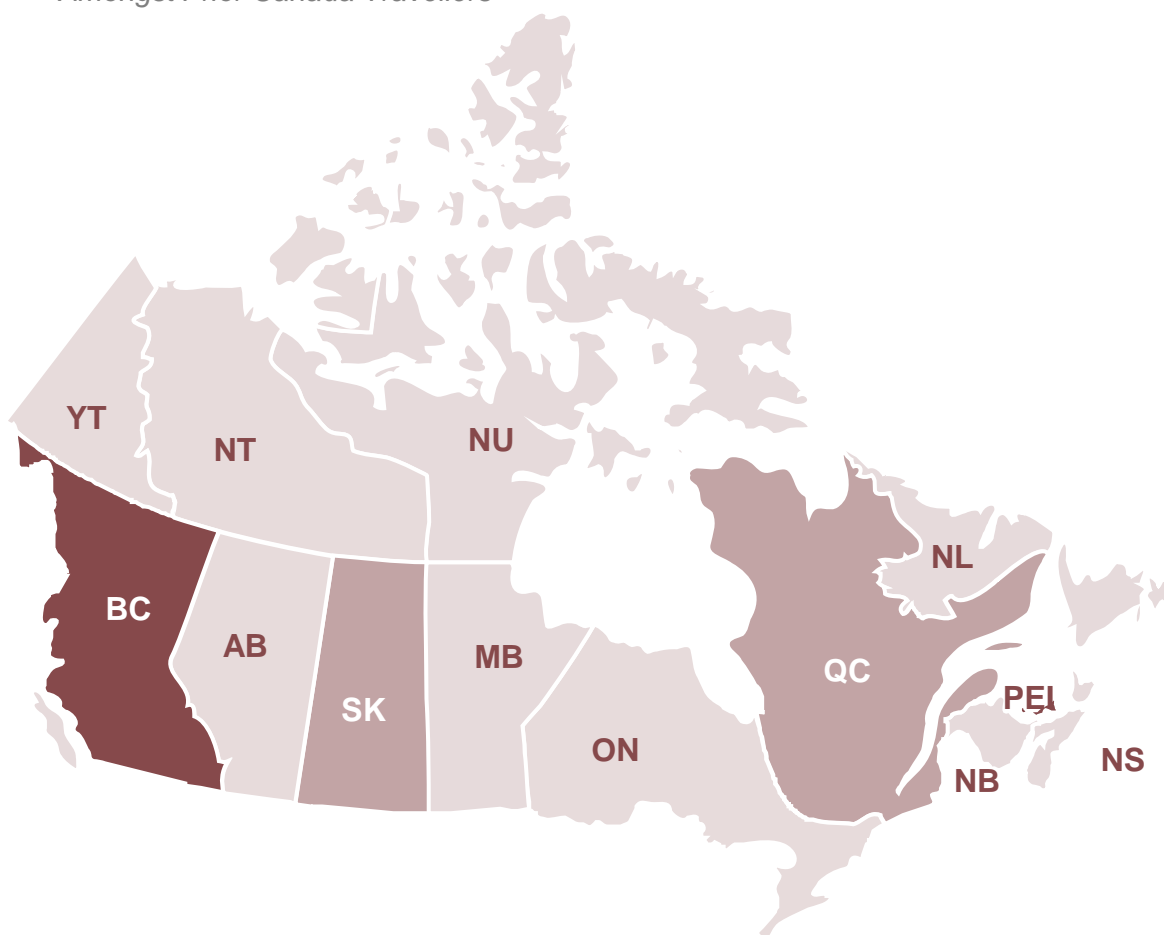


WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	12%	107
BC	23%	132
MB	3%	83
NB	7%	112
NL	3%	75
NS	13%	102
NT	2%	87
NU	4%	101
ON	40%	106
PEI	8%	126
QC	51%	124
SK	4%	121
YT	5%	87



REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- We have visited Canada in spring and summer.
- Overall we are well informed about Canada, and may be considering a trip.



CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	30%	18%	37%	22%
VS. TOTAL MARKET	30%	22%	35%	22%

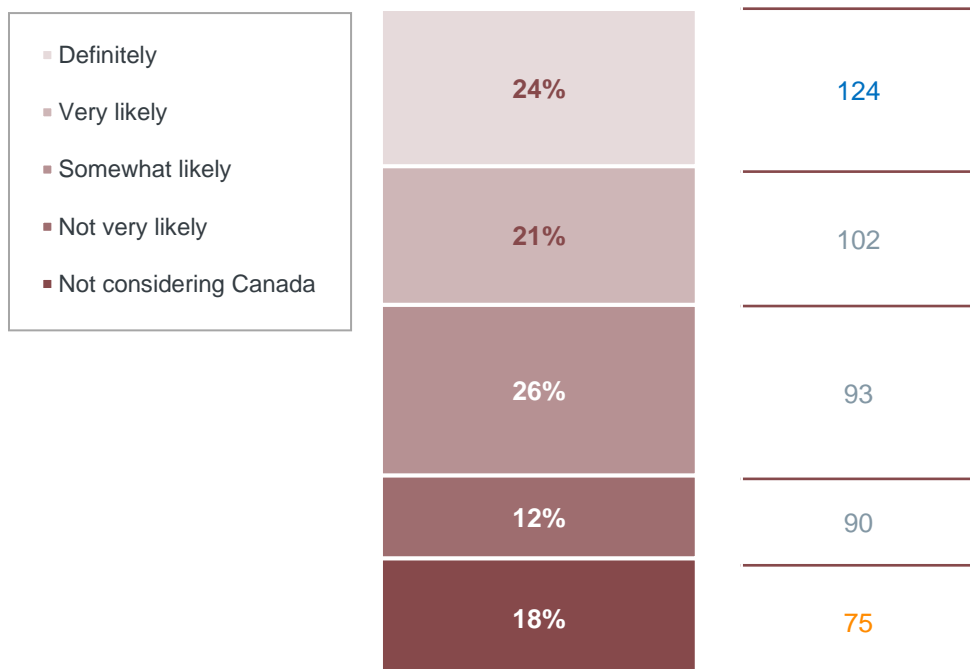
28%

Been to Canada in last 5 years

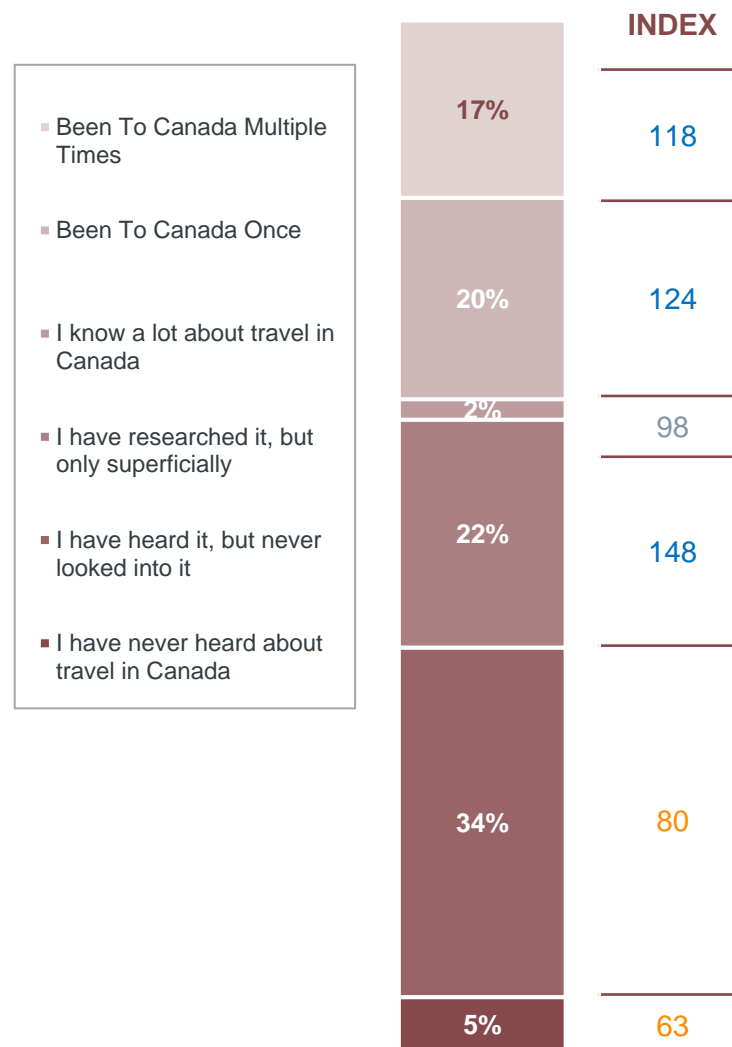
115 INDEX SCORE



LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA





REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

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



MAJOR LIFE EVENTS IN LAST 5 YEARS

10%

Had a child

86 INDEX SCORE

21%

Started a new job / career

63 INDEX SCORE

14%

Bought a new home

140 INDEX SCORE

6%

Moved to a new city

57 INDEX SCORE

15%

Child started school

93 INDEX SCORE

56%

Purchased a car

138 INDEX SCORE

4%

Retired

107 INDEX SCORE

44%

Renovated house

123 INDEX SCORE



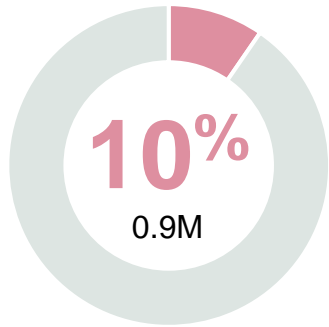
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	68%	150
Personal care and wellness	52%	85
Savings and investments	42%	115
Technology and gadgets	41%	112
Fashion and accessories	28%	96
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	25%	63



PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF MEXICO POPULATION

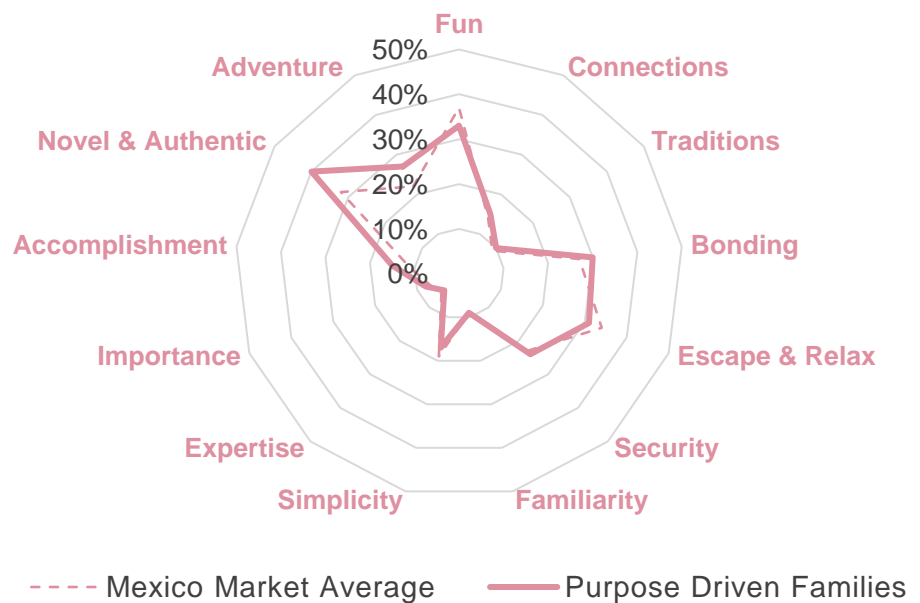
We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We take the time to engage with and learn from the destinations we visit, and take care to appreciate local cultures, and anywhere that lets us spend time in nature.

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

WHAT YOU NEED TO KNOW ABOUT ME

- 1 Understanding the history of the places we visit and the people we meet is important.
- 2 We value being able to provide these experiences to our children, but we also appreciate how it demonstrates our success to others.
- 3 Exposure to nature, exploring the outdoors, and immersing in culture make us feel fortunate.
- 4 We value and use the expertise of travel agents to ensure we are getting the best experiences.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

128

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

110

How is this calculated?

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



PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES



OVERALL INSIGHT

- We value learning, engaging with local cultures, and exploring the history of our destinations.
- We use travel to experience something new, and view this as an accomplishment.
- We are passionate about travel, and seek adventurous destinations that will make our friends say 'wow'.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	87%	128
I like to come back from travels having learnt something new	86%	127
I am more likely to select destinations / activities that invest in socially responsible tourism	81%	138
Trying out local cuisine is a really important part of travel	81%	126
I'm always on the look out for new destinations to visit next	81%	113
I like to be able to take my time at a historic site or in a museum and not feel rushed	78%	156
When I travel to natural environments it makes me reflect on how fortunate I am	76%	136
Videos and pictures on social media inspire me to travel	71%	114
I prefer booking flights and accommodations well in advance	70%	132
When there's a lot of positive buzz about a destination it makes me want to visit it more	68%	119
I generally think natural attractions are the highlights of my trip	57%	113
I seek travel advice from travel agencies and agents	49%	130
I seek out destinations where I can explore my ancestral heritage	46%	112



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	50%	134
To have authentic experiences	42%	126
To open my mind to new perspectives	29%	119
To be proud to share my travel experiences	25%	119
To feel like I've accomplished something	16%	145
To create new, or take part in old, traditions	10%	114



DESIRED DESTINATION

	SCORE	INDEX
Familiar	70%	124
Adventurous	34%	106
Unique	26%	116
Open	23%	116
Passionate	19%	120
Accepting	15%	133



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 moderate incomes.



AGE

	SCORE	INDEX
18-34	42%	107
35-54	50%	119
55+	8%	73
MEAN YEARS	38.0	83



HH INCOME (CAD)*

	SCORE	INDEX
Less than \$900	17%	85
\$900 to <\$6K	69%	122
\$6K or more	11%	115
Refused	3%	74

* HH Income reported by month



EMPLOYMENT

	SCORE	INDEX
Employed FT	61%	102
Employed PT	11%	88
Self-employed	17%	125
Retired	3%	89



EDUCATION

	SCORE	INDEX
Primary education or less	0%	74
Secondary education	6%	123
Post-secondary education	94%	78



73%

103 Have a valid passport



GENDER

44%

60 Male

56%

138 Female

0%

108 Non-binary / Other



HOUSEHOLD

96%

137 Children <18 Living At Home*

9%

76 Children 18+ Living At Home*

1%

70 Children NOT Living At Home*

3%

63 No Children

* Option is not exclusive



MEXICO REGION BREAKOUT

	SCORE	INDEX
Mexico City Metropolitan Area	25%	120
Centre-East	18%	127
Centre-West	17%	99
South	16%	91
Northeast	16%	73
Northwest	8%	77



SOCIO-ECONOMIC LEVEL

	SCORE	INDEX
A / B	51%	97
C+	49%	103



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS



TRAVEL TRADE INDEX: NON-GROUP

112

TRAVEL TRADE INDEX: GROUP

91

! 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

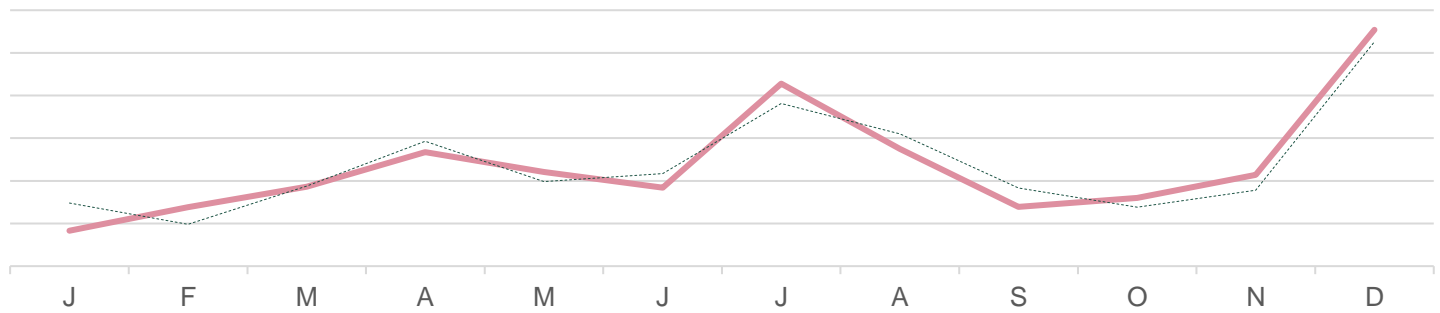
For additional definitions see [Glossary](#)



TYPICAL TRAVEL MONTHS

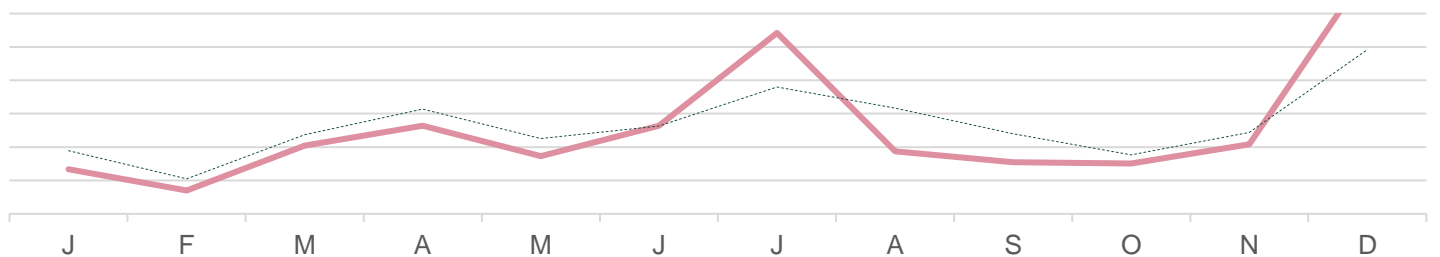
For Flights of 3–7 Hours

— Purpose Driven Families
 - - - Market Average



For Flights of 7+ Hours

— Purpose Driven Families
 - - - Market Average



TRIP DURATION

INDEX

1-2 Days	43%	123
3-5 Days	37%	121
1 Week Holiday	26%	108
2 Weeks Holiday	17%	112
3 Weeks Or More	8%	97

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	58%	123
International Leisure	20%	114
Business Trip	30%	113
Added Personal To Business	20%	114
Worked During Vacation	19%	116

Incidence is frequency of 2+ times per year



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	48%	90
Premium Hotel	28%	106
Vacation Rental (e.g., Airbnb, Vrbo)	26%	100
All-inclusive resort	25%	117
Friend's or family's place	23%	100
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	7%	95



THOUGHTS ON INDIGENOUS TRAVEL

72%

132 INDEX SCORE

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

17%

151 INDEX SCORE

Strong Interest In Indigenous Activities



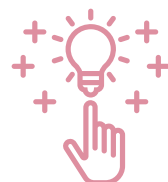
WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	87%	146
You only ever get to know a country by experiencing its culture	77%	116
I'm willing to put in the effort while travelling in order to see lesser-known places	66%	112
I like to explore places that are off the beaten path and less explored	56%	109
I'm open to travelling to destinations with limited tourist infrastructure	47%	116
I'm open to visiting destinations with challenging climates or weather conditions	44%	104



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

- We travel as a nuclear family, sometimes with extended family.
- Our budgets are usually mid-range, but we spend on experiences we really value.



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	80%	131
Kids	69%	132
Adult relatives	22%	84
Solo	6%	84
Friends	3%	73



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$3,580

120
INDEX SCORE

SPEND STYLE

Premium to High-end Luxury



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
I consider the impact that I personally have on the destinations I visit	70%	131
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	68%	128
It's important for me to know that the money I spend will support the local economy I'm visiting	65%	123
It's important to me that I visit somewhere that is open to diversity and inclusion	64%	116
Hearing from underrepresented communities is an important part of travelling	58%	116

78%

PRIORITIZE SUSTAINABLE TRAVEL

114 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

- Overnight experiences at resorts or cruises are a luxury we like to experience.
- We like to indulge in local cuisine and shopping.



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	69%	121
○ Amusement parks or theme parks	56%	122
○ Zoos or aquariums	54%	122
○ Space or science centres	25%	148
Nature experiences	56%	119
○ Oceanside beaches	39%	131
○ Visiting nature parks or preserves	24%	122
Overnight experiences	31%	118
○ Staying at all-inclusive resort	18%	118
○ Cruise	10%	122
Cultural experiences or attractions	59%	113
○ Museums	40%	116
○ Indigenous experiences	17%	151
Local cuisine	43%	112
○ Local restaurants	35%	108
○ Cafes or bakeries	21%	122
Shopping	42%	93
Guided tours	36%	106
Festivals and events	27%	95
Nightlife	21%	88
Health and wellness	18%	96
Water-based sports	16%	113
Winter-based sports	8%	109



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	77%	131	68%	127
To relax and unwind	62%	87	63%	116
To escape from routine	47%	114	29%	77
For adventure and excitement	28%	95	36%	108
To learn through other cultures	33%	108	32%	80
To have memories from top travel spots	9%	75	17%	133
For a romantic getaway	13%	106	15%	112
For personal reflection and growth	10%	94	9%	76
To be pampered	6%	71	4%	75



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3-7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	73%	132	76%	134
Kids wanted to go	68%	137	81%	138
Special event (e.g., wedding, reunion)	29%	100	33%	112
Visiting friends / family	32%	96	22%	79
Family / friends wanted to go	27%	86	22%	83
Festival or event	23%	97	18%	85

64% 126 INDEX SCORE

Travel aligns with children's school schedule

39% 98 INDEX SCORE

Take time off for vacation during major holidays

26% 87 INDEX SCORE

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



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

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

66%

Primary Trip Planner

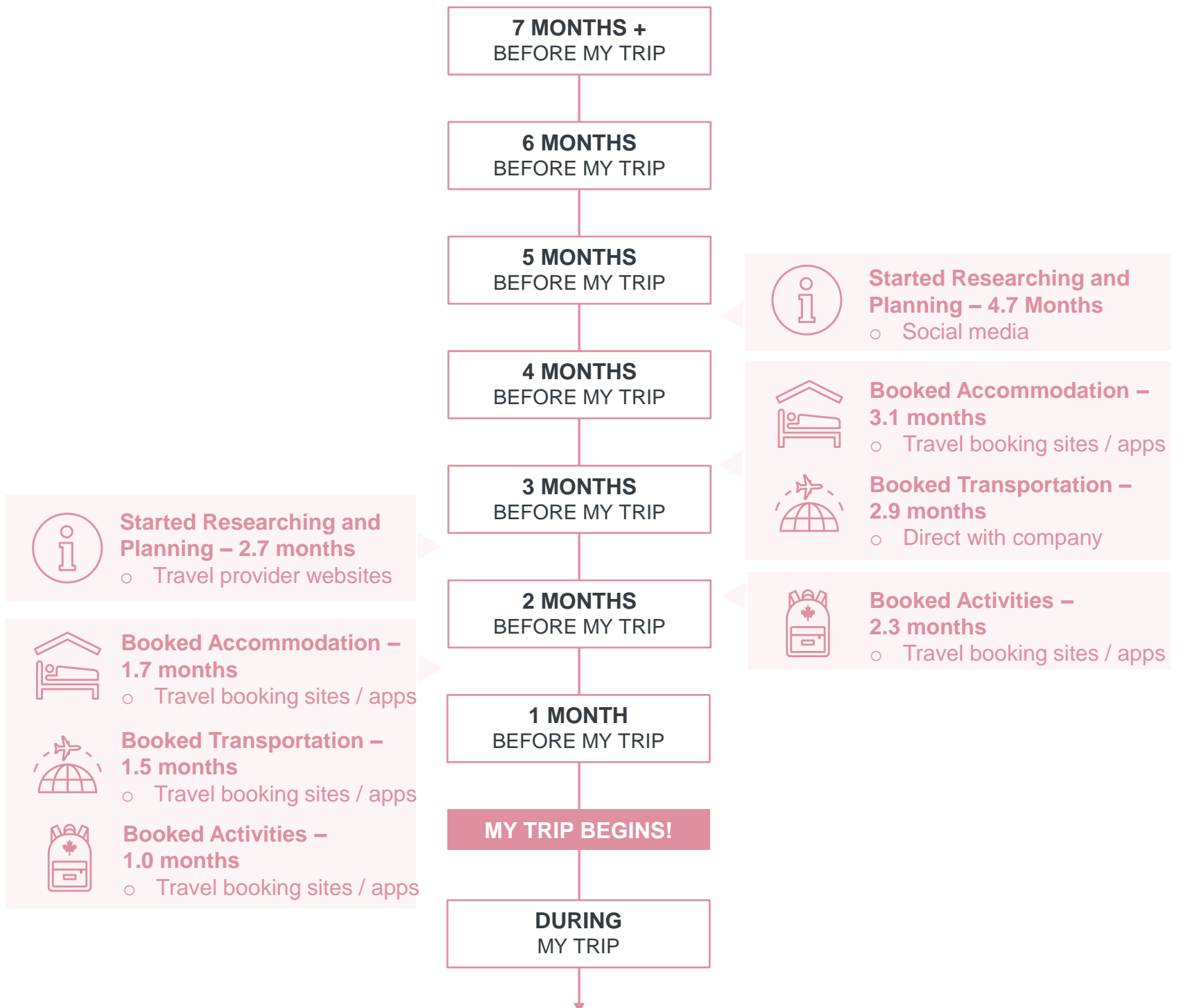
96
INDEX SCORE

! 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





PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

- Most of our trips are all about family - our immediate family but also extended family.
- We also take couples trips like Culture Seekers and Fun & Sun Families.

! **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

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

% OF TOTAL TRIPS

28% ¹⁸⁰ INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		51%
	Extended family		26%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
	Local restaurants		38%
	Oceanside beaches		36%
ACTIVITIES	Zoos or aquariums		31%
	KEY BEHAVIOURS: Exploring a nearby resort for a premium experience		

% OF TOTAL TRIPS

10% ¹¹¹ INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Nuclear family with kids		48%
	Extended family		20%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
	Outdoor markets		31%
	Historical or archeological sites		28%
ACTIVITIES	Nature walks		19%
	KEY BEHAVIOURS: Focus on learning about a new culture with our family		

% OF TOTAL TRIPS

6% ⁹⁶ INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Historical Site		
COMPANIONS	Couple only		32%
	Novel & Authentic	Fun	Adventure
TRIP EMOTIONAL MOTIVATIONS	Museums		43%
	Historical or archeological sites		38%
	Bars and pubs		23%
KEY BEHAVIOURS	Planned in advance, spending more, visiting friends, and exploring a new culture		

% OF TOTAL TRIPS

51% ¹⁴⁶ INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Nuclear Family		
DESTINATION TYPE	Urban centre		22%
	Fun	Escape & Relax	Bonding
TRIP EMOTIONAL MOTIVATIONS	Local restaurants		43%
	Visiting famous shopping centres		30%
	Amusement parks or theme parks		28%
KEY BEHAVIOURS	Non-beach family trips to familiar destinations, focussed family time together		



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

- We are looking for kid-friendly cultural destinations with access to nature and oceans.
- Most of our travel is closer to home, but our next most likely destination is North America.



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Mexico	59%	107	Argentina	3%	135
US	13%	85	Cuba	3%	136
Canada	4%	103	Italy	2%	85
Spain	4%	85	Belize	2%	129
Colombia	3%	119	Japan	2%	113



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	95%	141
Has a rich cultural and historical heritage	35%	112
Provide access to unique natural wonders	33%	114
Has a variety of museums and / or historical sites	28%	110
Is inclusive and tolerant	23%	122
Provides a variety of local festivals and events	19%	110
Provides opportunities to view wildlife in its natural habitat	19%	112
Provides a bustling and vibrant city vibe	13%	135



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- While many of us haven't visited Canada yet, those of us who have, are often repeat visitors.
- Quebec, Toronto, and Vancouver are major cities on our list for future trips.

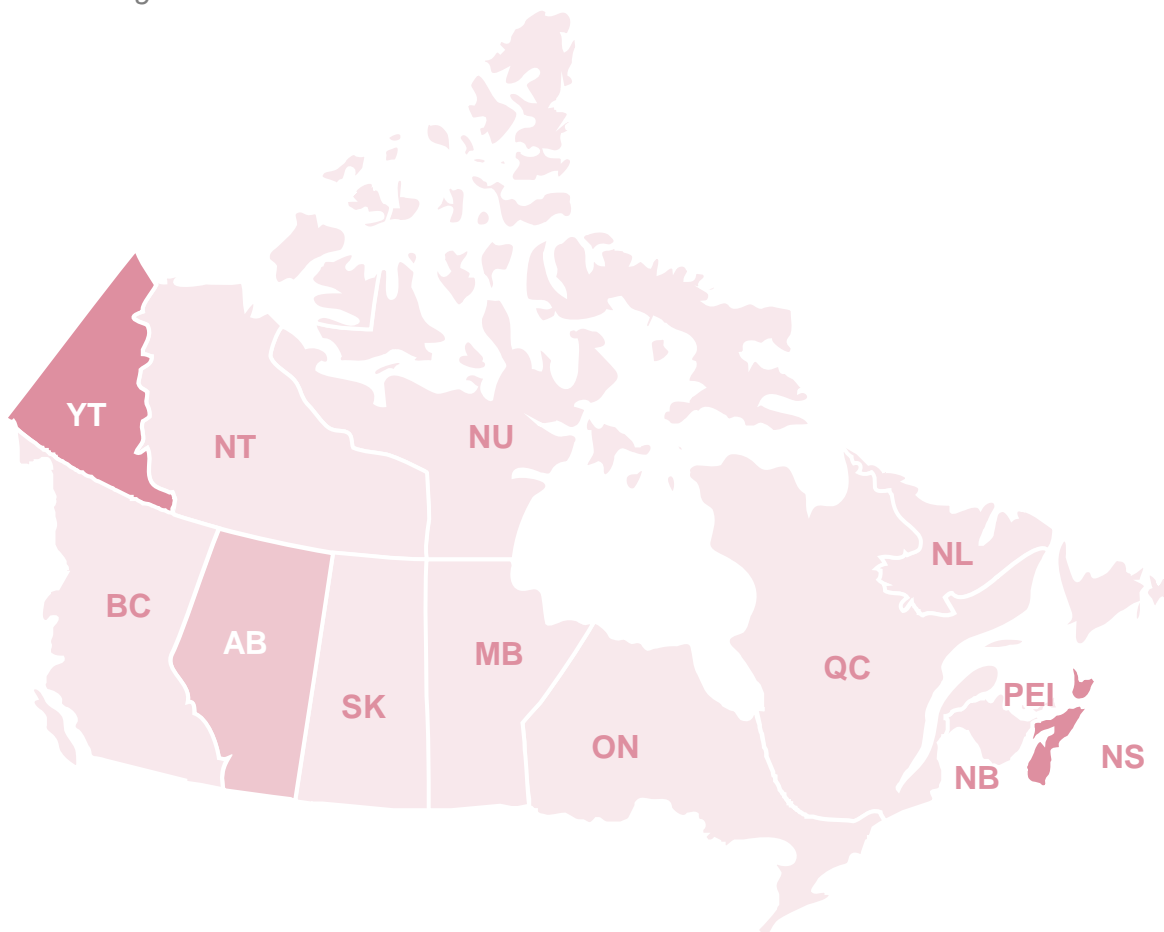


WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	14%	122
BC	16%	90
MB	5%	103
NB	5%	92
NL	5%	99
NS	21%	132
NT	4%	105
NU	4%	105
ON	34%	95
PEI	5%	95
QC	41%	81
SK	1%	76
YT	12%	153



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- For those of us who have visited Canada, it has been in winter and summer months, aligned with the school calendar.
- We don't know a lot about Canadian travel destinations, but would consider it.



CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	37%	21%	32%	19%
VS. TOTAL MARKET	30%	22%	35%	22%

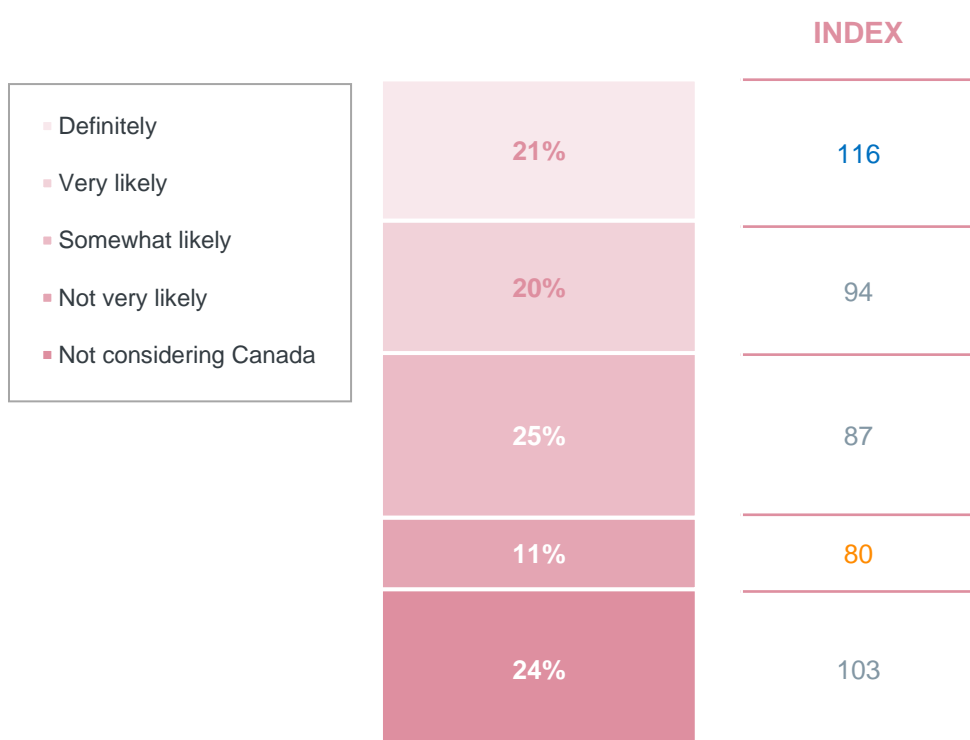
26%

Been to Canada in last 5 years

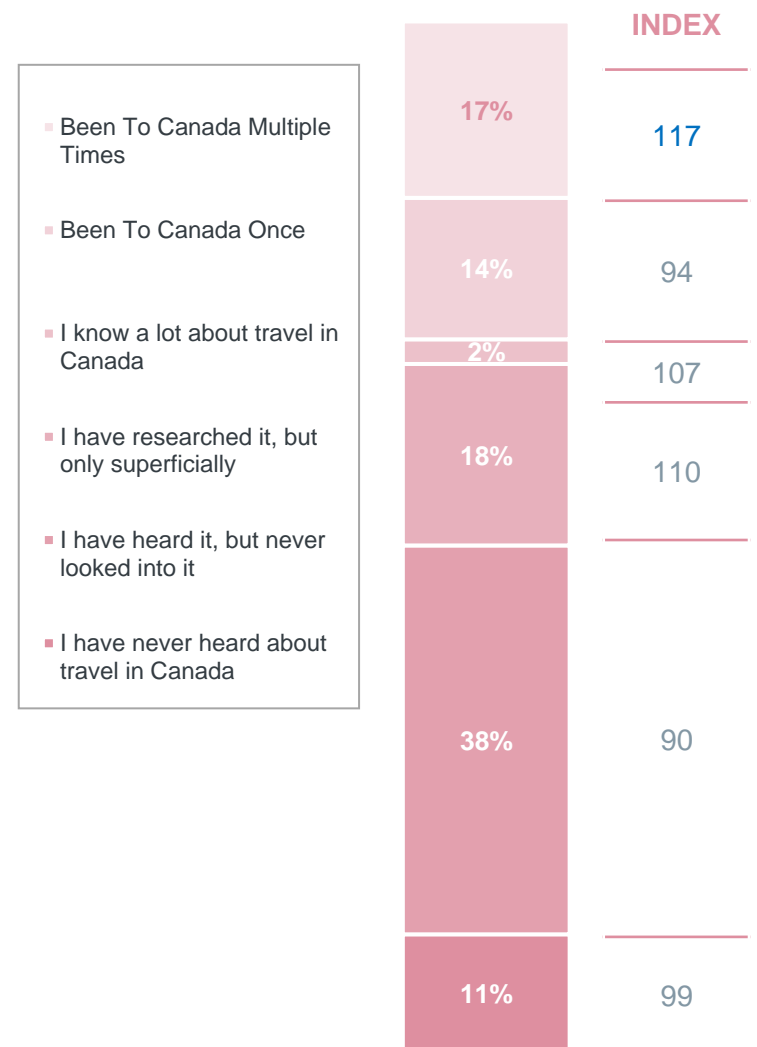
108 INDEX SCORE



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 vehicles, renovating our homes, and starting a family all take up our time and finances.
- We are also focussed on our growing and changing family, including seeing our kids start school for the first time.



MAJOR LIFE EVENTS IN LAST 5 YEARS

27%

Had a child

133 INDEX SCORE

26%

Started a new job / career

82 INDEX SCORE

10%

Bought a new home

101 INDEX SCORE

8%

Moved to a new city

83 INDEX SCORE

34%

Child started school

129 INDEX SCORE

50%

Purchased a car

119 INDEX SCORE

2%

Retired

80 INDEX SCORE

46%

Renovated house

137 INDEX SCORE



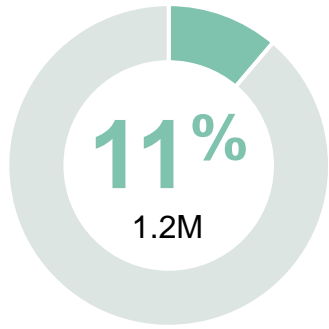
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Personal care and wellness	58%	129
Travel	53%	100
Savings and investments	40%	89
Technology and gadgets	39%	101
Home and decor	33%	125
Fashion and accessories	30%	107



CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



% OF MEXICO POPULATION

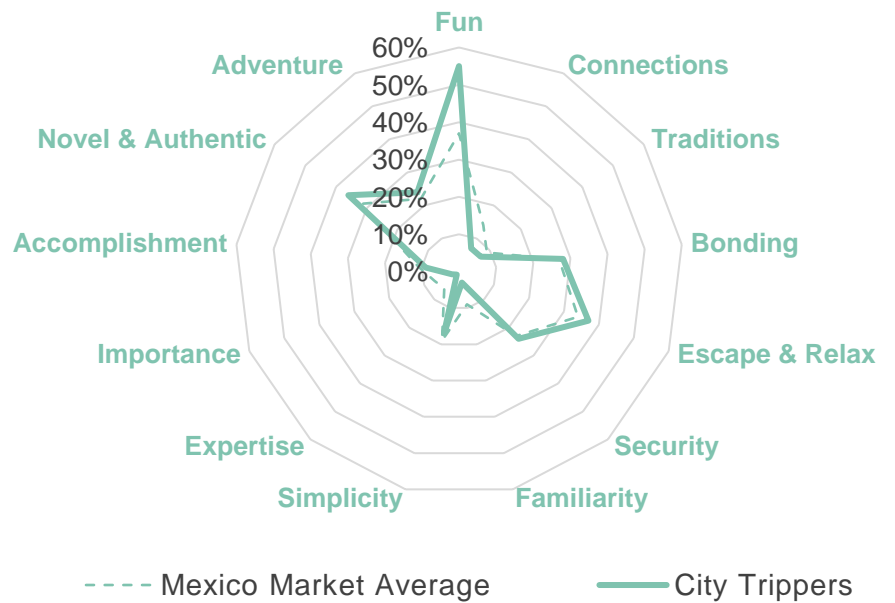
We are independent, sociable, and trendy travellers who prioritize having fun, indulging, and living in the moment. We prefer trendy, friendly locations with a variety of activities and distractions, valuing safety and ease of travel.

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

WHAT YOU NEED TO KNOW ABOUT ME

- 1 We prioritize fun and social settings and seek experiences that are worth sharing on social media.
- 2 We like to let loose, find adventure, and forget about the day to day. If a destination garners a lot of positive buzz, it heightens our desire to visit.
- 3 We value simplicity in our travels, preferring destinations that are easy to maneuver and travel around in.
- 4 We tend to travel with our extended family and as a couple. We even travel with our grown kids sometimes.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

68

How is this calculated?

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



TRAVELLER ECONOMIC INDEX

79

How is this calculated?

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



CITY TRIPPERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



OVERALL INSIGHT

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



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	85%	139
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	63%	137
I prefer booking flights and accommodations well in advance	70%	128
I prefer destinations with well-established tourist infrastructure	68%	124
I generally stick to the most popular areas when I visit somewhere	64%	122
I generally don't think much on the impact that I personally have on the destinations I visit	51%	126
I like natural attractions but I don't usually think they are the highlights of my trip	59%	127
I love posting my trips on social media to share with friends	61%	120
I will generally not go out of my way to buy local when travelling	49%	148
Videos and pictures on social media inspire me to travel	71%	113
I'm more interested in the present and don't focus much on the history of where I visit	32%	121
When there's a lot of positive buzz about a destination it makes me want to visit it more	66%	113
I enjoy the beauty of nature without reflecting too much on its significance	39%	134



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	77%	134
To indulge myself and live in the moment	66%	140
To let loose and forget about day-to-day life	57%	118
To explore and discover new things / places	47%	122
To have authentic experiences	38%	115
To have a fun, social setting	22%	138



DESIRED DESTINATION

	SCORE	INDEX
Fun	78%	141
Friendly	53%	144
Trendy	35%	149
Charming	34%	119
Sociable	32%	139
Practical	26%	109



CITY TRIPPERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

- While we represent a diverse age range, we skew towards being Millennials, working full-time and earning an average income.
- Many of us are not parents, or our children are older and not living at home anymore.



AGE

	SCORE	INDEX
18-34	45%	114
35-54	34%	75
55+	21%	111
MEAN YEARS	39.2	92



HH INCOME (CAD)*

	SCORE	INDEX
Less than \$900	27%	128
\$900 to <\$6K	63%	68
\$6K or more	6%	75
Refused	5%	124

* HH Income reported by month



EMPLOYMENT

	SCORE	INDEX
Employed FT	58%	88
Employed PT	13%	117
Self-employed	11%	75
Retired	3%	93



EDUCATION

	SCORE	INDEX
Primary education or less	0%	74
Secondary education	3%	89
Post-secondary education	97%	112



68%

92 Have a valid passport



GENDER

50%

102 Male

50%

99 Female

0%

75 Non-binary / Other



HOUSEHOLD

47%

74 Children <18 Living At Home*

16%

98 Children 18+ Living At Home*

6%

107 Children NOT Living At Home*

48%

128 No Children

* Option is not exclusive



MEXICO REGION BREAKOUT

	SCORE	INDEX
South	23%	131
Mexico City Metropolitan Area	19%	83
Northeast	18%	105
Centre-West	16%	91
Centre-East	13%	69
Northwest	11%	113



SOCIO-ECONOMIC LEVEL

	SCORE	INDEX
A / B	53%	104
C+	47%	96



CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: NON-GROUP

60

TRAVEL TRADE INDEX: GROUP

112

! KEY terminology on this page

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

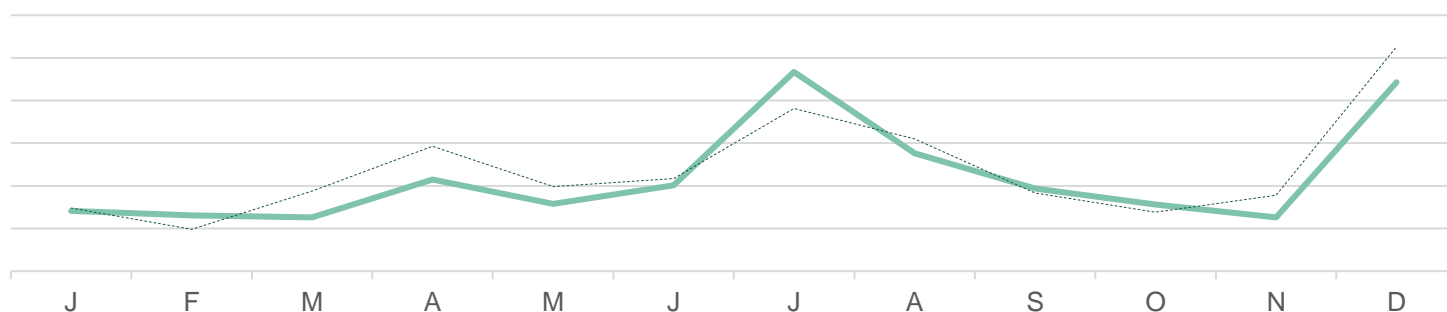
For additional definitions see [Glossary](#)



TYPICAL TRAVEL MONTHS

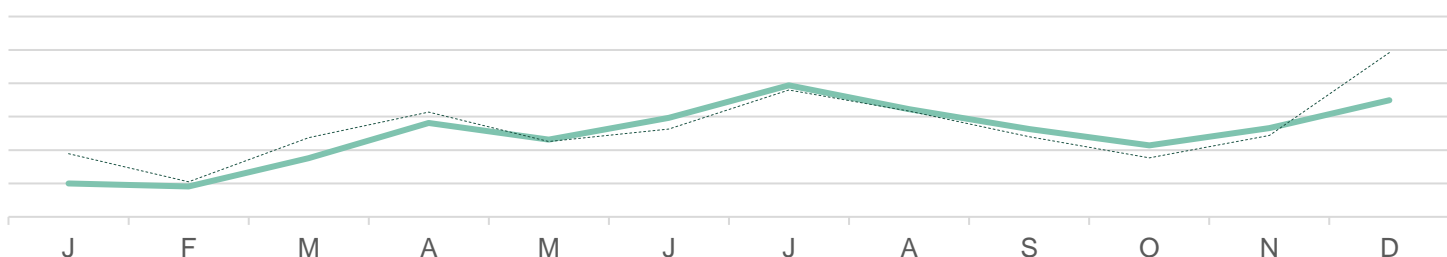
For Flights of 3–7 Hours

— City Trippers
- - - Market Average



For Flights of 7+ Hours

— City Trippers
- - - Market Average



TRIP DURATION

INDEX

1-2 Days	43%	119
3-5 Days	32%	105
1 Week Holiday	18%	86
2 Weeks Holiday	6%	68
3 Weeks Or More	3%	71

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	57%	120
International Leisure	11%	83
Business Trip	18%	82
Added Personal To Business	9%	76
Worked During Vacation	9%	72

Incidence is frequency of 2+ times per year



CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	61%	126
Vacation Rental (e.g., Airbnb, Vrbo)	32%	141
Friend's or family's place	27%	112
Premium Hotel	19%	84
All-inclusive resort	18%	89
Budget Hotel	5%	116



THOUGHTS ON INDIGENOUS TRAVEL

46%

65 INDEX SCORE

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

10%

88 INDEX SCORE

Strong Interest In Indigenous Activities



WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	74%	97
I really want to learn about the history of the destinations I visit	68%	79
I'm willing to put in the effort while travelling in order to see lesser-known places	54%	89
I'm open to visiting destinations with challenging climates or weather conditions	42%	98
I like to explore places that are off the beaten path and less explored	36%	78
I'm open to travelling to destinations with limited tourist infrastructure	33%	76



CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

- We travel with our extended family and as a couple. We even travel with our grown kids sometimes.
- Our budgets are generally focussed on value and affordability.



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	57%	76
Adult relatives	35%	128
Kids	27%	82
Friends	15%	139
Solo	9%	104



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$2,340

80
INDEX SCORE

SPEND STYLE

Mid-range to Premium



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	51%	52
I consider the impact that I personally have on the destinations I visit	49%	74
It's important to me that I visit somewhere that is open to diversity and inclusion	44%	80
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	37%	63
Hearing from underrepresented communities is an important part of travelling	31%	69

58%

PRIORITIZE SUSTAINABLE TRAVEL

71 INDEX SCORE

! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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



CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES



OVERALL INSIGHT

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



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Shopping	60%	141
○ Visiting famous shopping centres or areas	43%	141
○ Souvenir shopping	34%	140
○ Outdoor markets	30%	139
Family-focused attractions	62%	109
○ Amusement parks or theme parks	50%	112
○ Zoos or aquariums	44%	105
Cultural experiences or attractions	59%	113
○ Museums	41%	121
○ Observing architecture	28%	131
Nightlife	46%	142
○ Bars and pubs	30%	138
○ Clubs and dancing	24%	137
Festivals and events	37%	123
○ Music concerts or festivals	23%	130
○ Cultural or traditional festivals	17%	121
Local cuisine	41%	107
Nature experiences	39%	78
Guided tours	35%	97
Overnight experiences	29%	110
Health and wellness	13%	65
Water-based sports	11%	78
Casual sports	5%	75



CITY TRIPPERS

OUR BEHAVIOURS – WHY WE TRAVEL



INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3-7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	72%	119	57%	92
To spend time with family	56%	99	46%	94
To escape from routine	43%	97	38%	98
To learn through other cultures	34%	111	42%	105
For adventure and excitement	41%	142	37%	111
To have fun with friends	16%	130	15%	108
For a romantic getaway	8%	49	9%	82
To have memories from top travel spots	9%	78	8%	91
To check off dream travel places	13%	131	17%	118



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3-7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	51%	77	49%	84
Family / friends wanted to go	25%	72	39%	123
Visiting friends / family	39%	128	36%	104
Festival or event	23%	97	36%	129
Special event (e.g., wedding, reunion)	20%	69	32%	109
Kids wanted to go	28%	75	26%	85

36% ⁷³ INDEX SCORE

Travel aligns with children's school schedule

35% ⁸⁵ INDEX SCORE

Take time off for vacation during major holidays

28% ⁹⁶ INDEX SCORE

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



CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

- We plan in advance for most trips, and book all components, even activities, a few months ahead for long-haul trips. We like to book transportation directly with the company.

65%

Primary Trip Planner

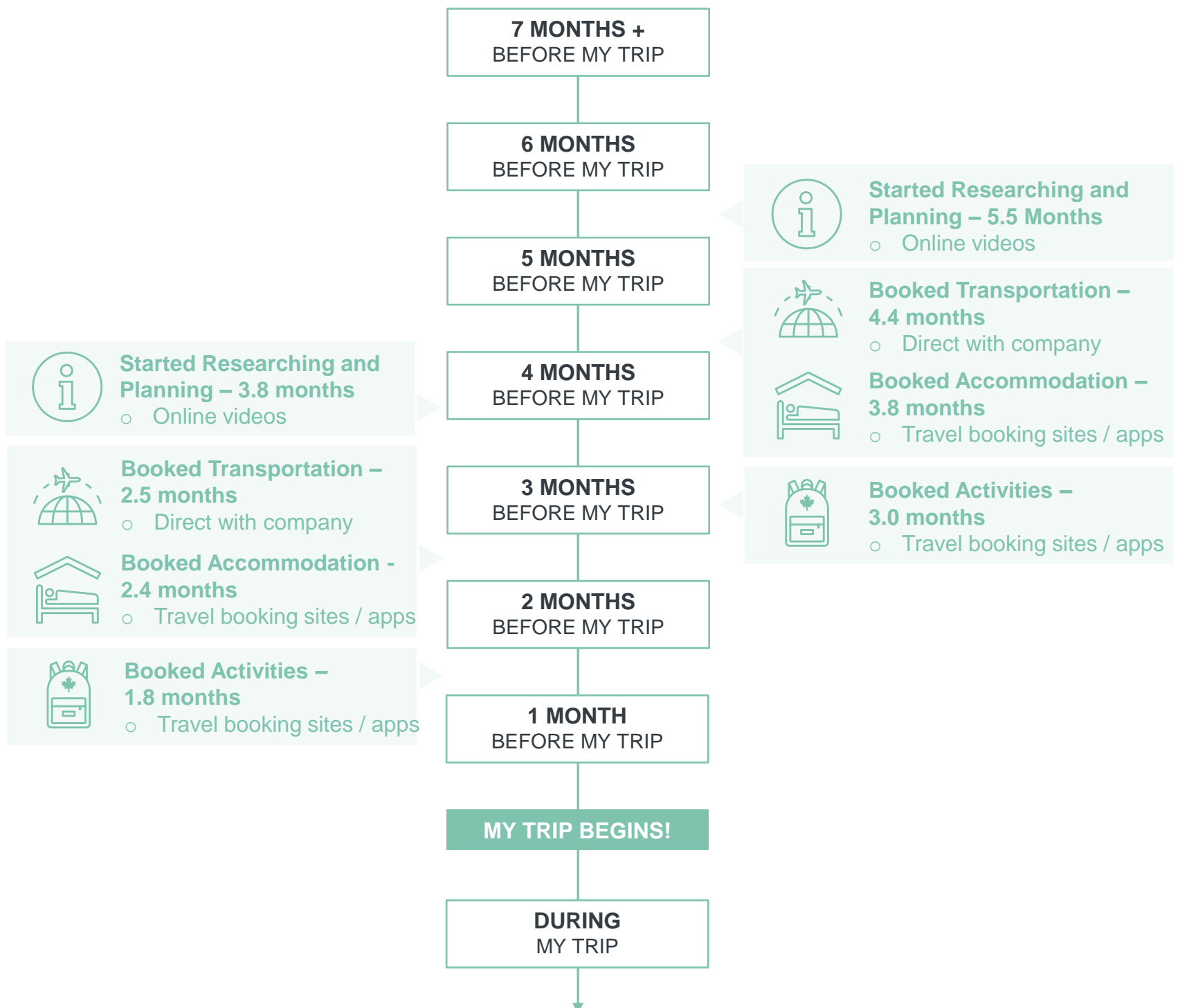
93
INDEX SCORE

! 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





CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

- Most of our trips are focused on fun and spending time together.
- We also take trips like Culture Seekers and 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

10% ⁸⁴ INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Friends Trip		
DESTINATION TYPE	Urban centre	25%	
	Beach resort	13%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Bars and pubs	45%	
	Clubs and dancing	35%	
	Street cuisine	26%	
KEY BEHAVIOURS	Fun, indulgence, and nightlife with friends		

% OF TOTAL TRIPS

23% ¹⁵⁶ INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	34%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants	47%	
	Visiting famous shopping centres	45%	
	Souvenir shopping	45%	
KEY BEHAVIOURS	Couples trip to escape to a safe and trendy locale. Needs to be easy and lively		

% OF TOTAL TRIPS

9% ¹⁰⁷ INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	35%	
	Nuclear family with kids	22%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Novel & Authentic
ACTIVITIES	Local restaurants	34%	
	Historical or archeological sites	28%	
	Museums	26%	
KEY BEHAVIOURS	Spending a little more, seeking an authentic cultural experience to learn from		

% OF TOTAL TRIPS

9% ⁸² INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre	20%	
	Small cities & towns	15%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Bars and pubs	30%	
	Clubs and dancing	13%	
	Camping	12%	
KEY BEHAVIOURS	May be staying with friends, seeking some adventure, planning last minute		



CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

- We seek destinations that are easy to travel to and around, boasting renowned food and drink experiences, and vibrant nightlife.
- We tend to travel within Mexico mostly. Outside of Mexico we have visited Spain and US.



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Mexico	62%	112	Canada	3%	68
US	15%	107	UK	2%	120
Spain	4%	83	Germany	2%	106
France	3%	98	Colombia	2%	90
Italy	3%	115	Cuba	1%	106



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has famous attractions	43%	149
Is easy to travel to	43%	118
Is easy to travel around once there	36%	132
Renowned for food and drink experiences	30%	118
Has vibrant nightlife and entertainment	27%	135
Language is not a barrier	26%	132
Provides a variety of local festivals and events	21%	116
Is a trendy destination	15%	134



CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- Not many of us have visited Canada before, and if we have been it was only one time.
- Top provinces visited are Ontario and Quebec.
- Future trip interests may be Toronto and Vancouver.

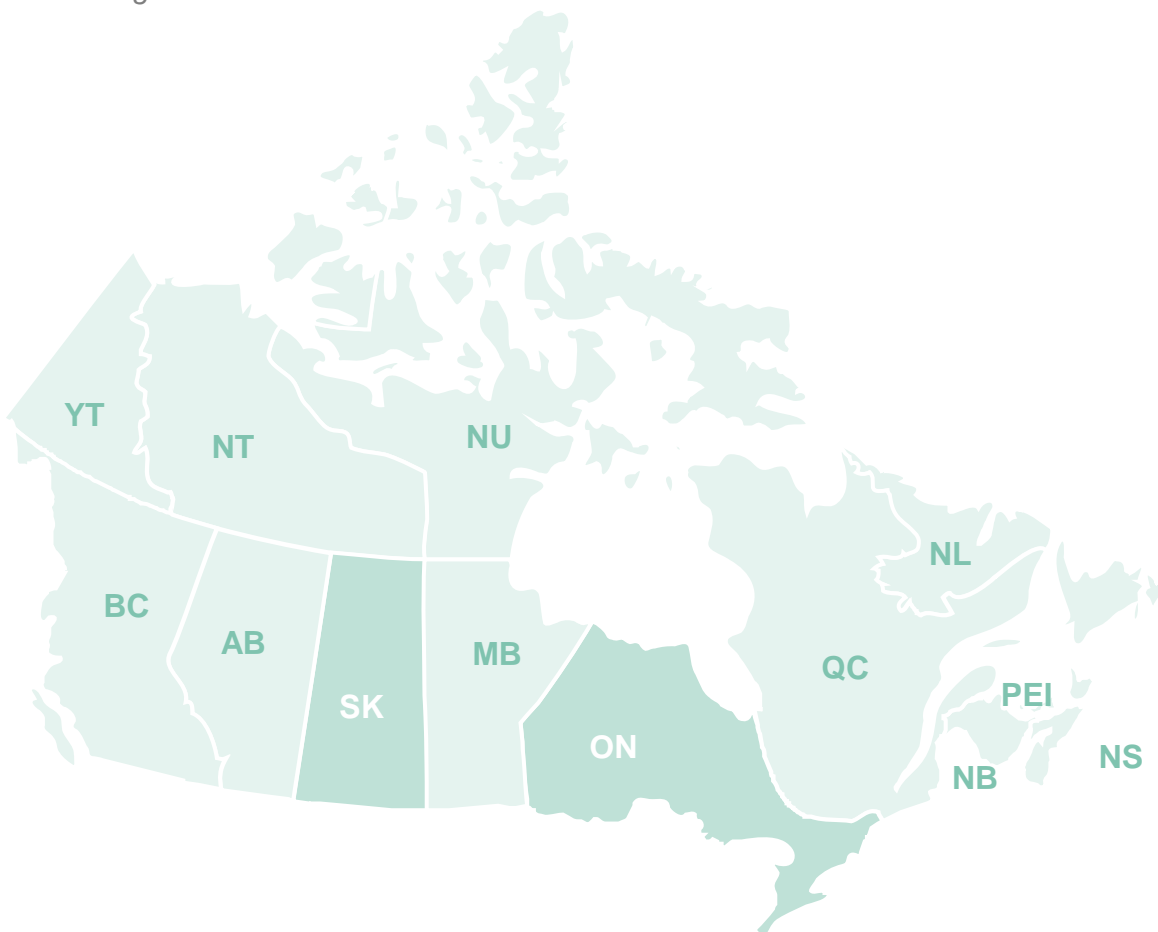


WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	6%	55
BC	13%	66
MB	2%	72
NB	1%	61
NL	4%	91
NS	7%	82
NT	1%	77
NU	3%	91
ON	48%	120
PEI	5%	98
QC	45%	99
SK	4%	116
YT	6%	100



CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- We tend to visit Canada in the summer but quite a few have also visited in December and October.
- We are somewhat familiar with what Canada has to offer but we have never really looked into it too deeply.



CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	30%	16%	34%	29%
VS. TOTAL MARKET	30%	22%	35%	22%

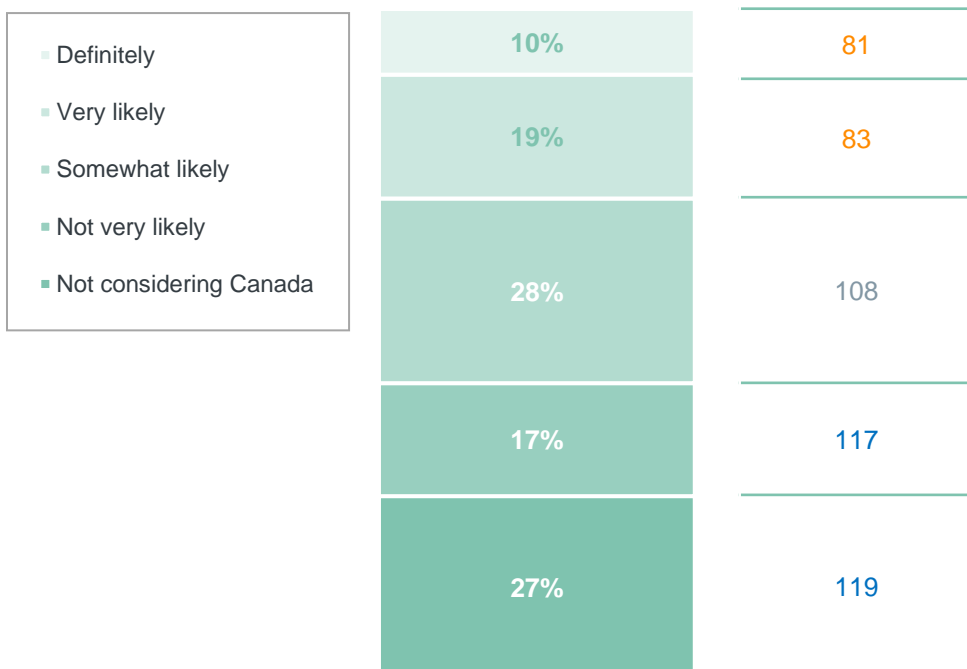
15%

Been to Canada in last 5 years

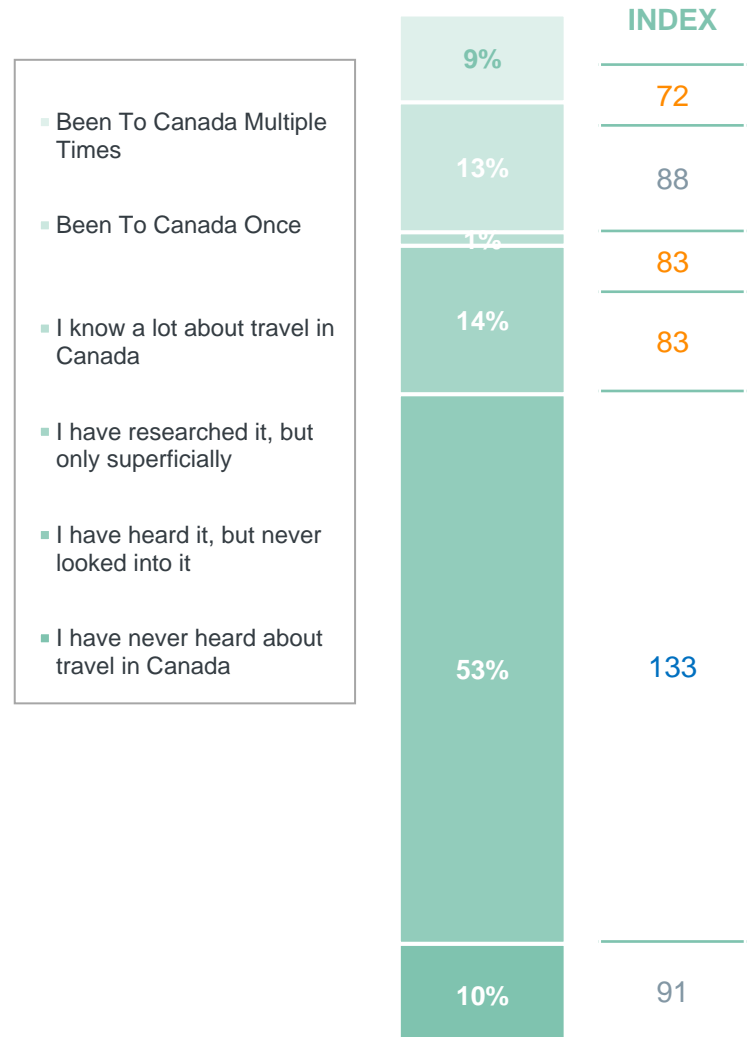
79 INDEX SCORE



LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA





CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

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



MAJOR LIFE EVENTS IN LAST 5 YEARS

9%

Had a child

81 INDEX SCORE

37%

Started a new job / career

125 INDEX SCORE

9%

Bought a new home

92 INDEX SCORE

10%

Moved to a new city

109 INDEX SCORE

11%

Child started school

83 INDEX SCORE

39%

Purchased a car

84 INDEX SCORE

5%

Retired

117 INDEX SCORE

38%

Renovated house

73 INDEX SCORE



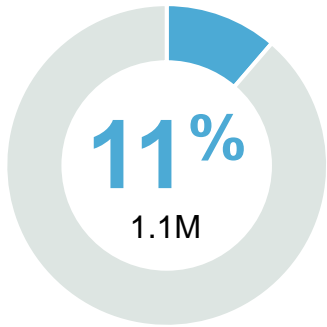
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	57%	115
Personal care and wellness	54%	95
Savings and investments	38%	74
Technology and gadgets	36%	76
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	33%	130
Fashion and accessories	32%	127



SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



% OF MEXICO POPULATION

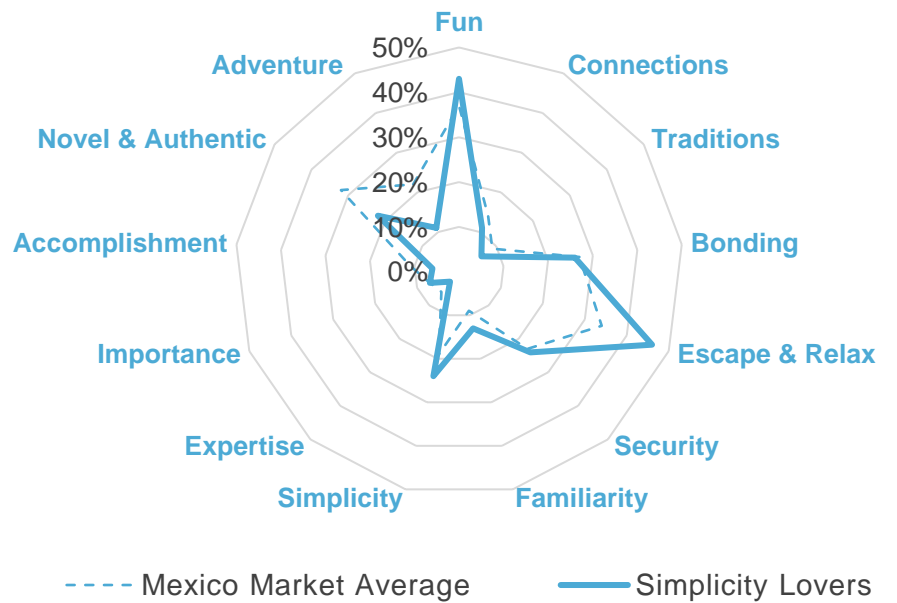
We seek peace, relaxation, and familiarity in our journeys, preferring easy and affordable destinations with a small-town feel. Prioritizing dining and nature experiences, we value simplicity and serenity.

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

WHAT YOU NEED TO KNOW ABOUT ME

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

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

72

How is this calculated?

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



TRAVELLER ECONOMIC INDEX

65

How is this calculated?

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



SIMPLICITY LOVERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



OVERALL INSIGHT

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



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I don't generally seek out luxury experiences while travelling	83%	132
I generally avoid places that are challenging or difficult to reach	81%	141
I generally only choose destinations with comfortable climate and weather conditions	77%	140
I don't see the point of posting about my trips on social media	72%	149
Quiet, relaxed experiences are how I take care of myself on vacation	72%	144
I generally don't participate in physical activities during my holidays	62%	141
While travelling I generally stick to places that are direct and convenient to get to	59%	134
I generally don't try to learn local languages	57%	135
I travel when I need to	55%	150
I generally don't think much on the impact that I personally have on the destinations I visit	54%	134
Generally I'm not influenced by what destinations are popular or trendy at the moment	53%	154
I generally prefer to go back to the same destinations on holiday	51%	148
I don't consider travel to be an important milestone of growing up	28%	143



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To let loose and forget about day-to-day life	64%	135
To escape the demands of everyday life	41%	135
To find much-needed time to relax	39%	129
To enjoy simple, straightforward travel	31%	153
To feel confident travel with no surprises	18%	131
To be familiar with my surroundings	18%	130



DESIRED DESTINATION

	SCORE	INDEX
Relaxed	75%	153
Peaceful	71%	153
Familiar	67%	121
Practical	39%	153
Carefree	37%	132
Reliable	24%	136



SIMPLICITY LOVERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

- We are generally aged 45+.
- We are generally working, self-employed, or running our home. Some of us are retired.
- Our kids are older or have moved out already. We are likely empty nesters.



AGE

	SCORE	INDEX
18-34	28%	69
35-54	39%	89
55+	33%	145
MEAN YEARS	45.3	142



HH INCOME (CAD)*

	SCORE	INDEX
Less than \$900	26%	122
\$900 to <\$6K	64%	78
\$6K or more	6%	77
Refused	5%	119

* HH Income reported by month



EMPLOYMENT

	SCORE	INDEX
Employed FT	48%	48
Employed PT	10%	86
Self-employed	19%	146
Retired	7%	148



EDUCATION

	SCORE	INDEX
Primary education or less	0%	74
Secondary education	7%	128
Post-secondary education	94%	74



60%

76 Have a valid passport



GENDER

52%

115 Male

47%

82 Female

1%

142 Non-binary / Other



HOUSEHOLD

51%

80 Children <18 Living At Home*

33%

149 Children 18+ Living At Home*

9%

132 Children NOT Living At Home*

40%

117 No Children

* Option is not exclusive



MEXICO REGION BREAKOUT

	SCORE	INDEX
Mexico City Metropolitan Area	21%	95
Northeast	18%	98
South	18%	101
Centre-East	16%	102
Centre-West	15%	80
Northwest	13%	138



SOCIO-ECONOMIC LEVEL

	SCORE	INDEX
A / B	46%	72
C+	55%	128



SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS



TRAVEL TRADE INDEX: NON-GROUP

83

TRAVEL TRADE INDEX: GROUP

81

! KEY terminology on this page

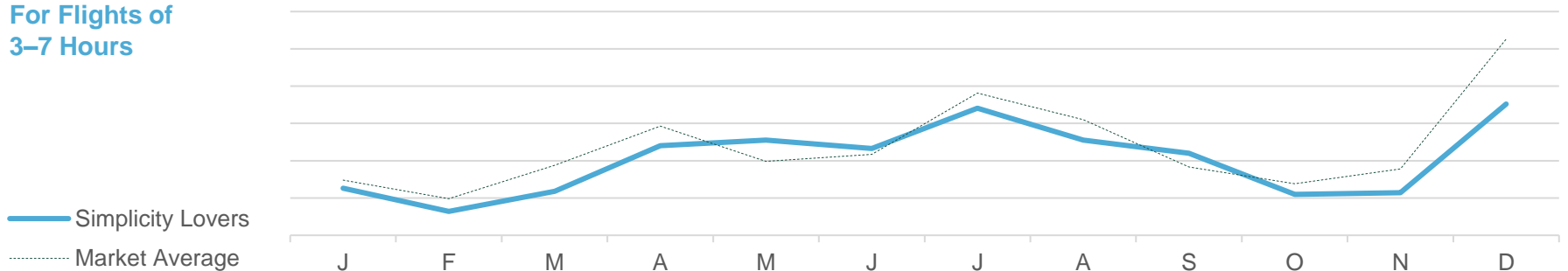
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **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](#)

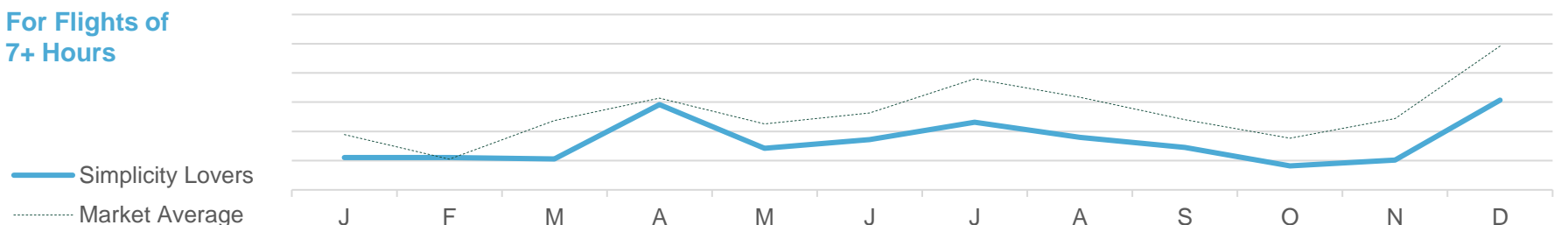


TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

INDEX

1-2 Days	32%	64
3-5 Days	17%	57
1 Week Holiday	9%	57
2 Weeks Holiday	6%	66
3 Weeks Or More	3%	70

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	39%	60
International Leisure	4%	59
Business Trip	11%	63
Added Personal To Business	7%	70
Worked During Vacation	9%	70

Incidence is frequency of 2+ times per year



SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	60%	123
Friend's or family's place	37%	144
Vacation Rental (e.g., Airbnb, Vrbo)	20%	57
Premium Hotel	17%	77
All-inclusive resort	15%	76
Budget Hotel	6%	134



THOUGHTS ON INDIGENOUS TRAVEL

50%

76 INDEX SCORE

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

9%

81 INDEX SCORE

Strong Interest In Indigenous Activities



WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	73%	92
I really want to learn about the history of the destinations I visit	67%	75
I'm willing to put in the effort while travelling in order to see lesser-known places	41%	66
I like to explore places that are off the beaten path and less explored	38%	81
I'm open to travelling to destinations with limited tourist infrastructure	37%	89
I'm open to visiting destinations with challenging climates or weather conditions	23%	60



SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

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



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	64%	92
Adult relatives	38%	142
Kids	38%	95
Friends	8%	97
Solo	6%	80



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$2,060

72
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	58%	85
I consider the impact that I personally have on the destinations I visit	46%	66
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	44%	78
It's important to me that I visit somewhere that is open to diversity and inclusion	43%	79
Hearing from underrepresented communities is an important part of travelling	39%	82

61%

PRIORITIZE SUSTAINABLE TRAVEL

77 INDEX SCORE

! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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



SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES



OVERALL INSIGHT

- Our activities are low-impact, including family activities for our larger travel groups, dining and shopping.
- We like to get outside for walks and appreciate beaches and lakes.



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions <ul style="list-style-type: none"> ○ Zoos or aquariums ○ Amusement parks or theme parks ○ Other family-focused attractions 	60% 44% 43% 10%	106 105 99 109
Cultural experiences or attractions <ul style="list-style-type: none"> ○ Museums ○ Historical or archeological sites 	56% 35% 34%	104 92 98
Nature experiences <ul style="list-style-type: none"> ○ Oceanside beaches ○ Nature walks 	51% 35% 21%	107 115 101
Shopping <ul style="list-style-type: none"> ○ Souvenir shopping ○ Outdoor markets 	49% 28% 24%	110 115 110
Local cuisine <ul style="list-style-type: none"> ○ Local restaurants ○ Street cuisine 	43% 38% 24%	111 116 119
Guided tours	33%	80
Festivals and events	17%	65
Health and wellness	16%	81
Overnight experiences	13%	50
Nightlife	11%	65
Water-based sports	10%	70
Casual sports	8%	95



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	72%	117	68%	137
To spend time with family	66%	115	59%	113
To escape from routine	51%	133	55%	139
To have fun with friends	10%	97	13%	97
For a romantic getaway	11%	83	19%	133
For adventure and excitement	25%	84	13%	58
To learn through other cultures	15%	65	20%	50
For personal reflection and growth	21%	130	14%	111
To have memories from top travel spots	10%	85	12%	109



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3-7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	63%	107	68%	120
Visiting friends / family	33%	104	52%	133
Family / friends wanted to go	32%	132	36%	117
Special event (e.g., wedding, reunion)	19%	65	17%	47
Kids wanted to go	39%	93	34%	92
Festival or event	17%	81	9%	63

43% 86 INDEX SCORE

Travel aligns with children's school schedule

28% 56 INDEX SCORE

Take time off for vacation during major holidays

30% 112 INDEX SCORE

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



SIMPLICITY LOVERS

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

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

53%

Primary Trip Planner

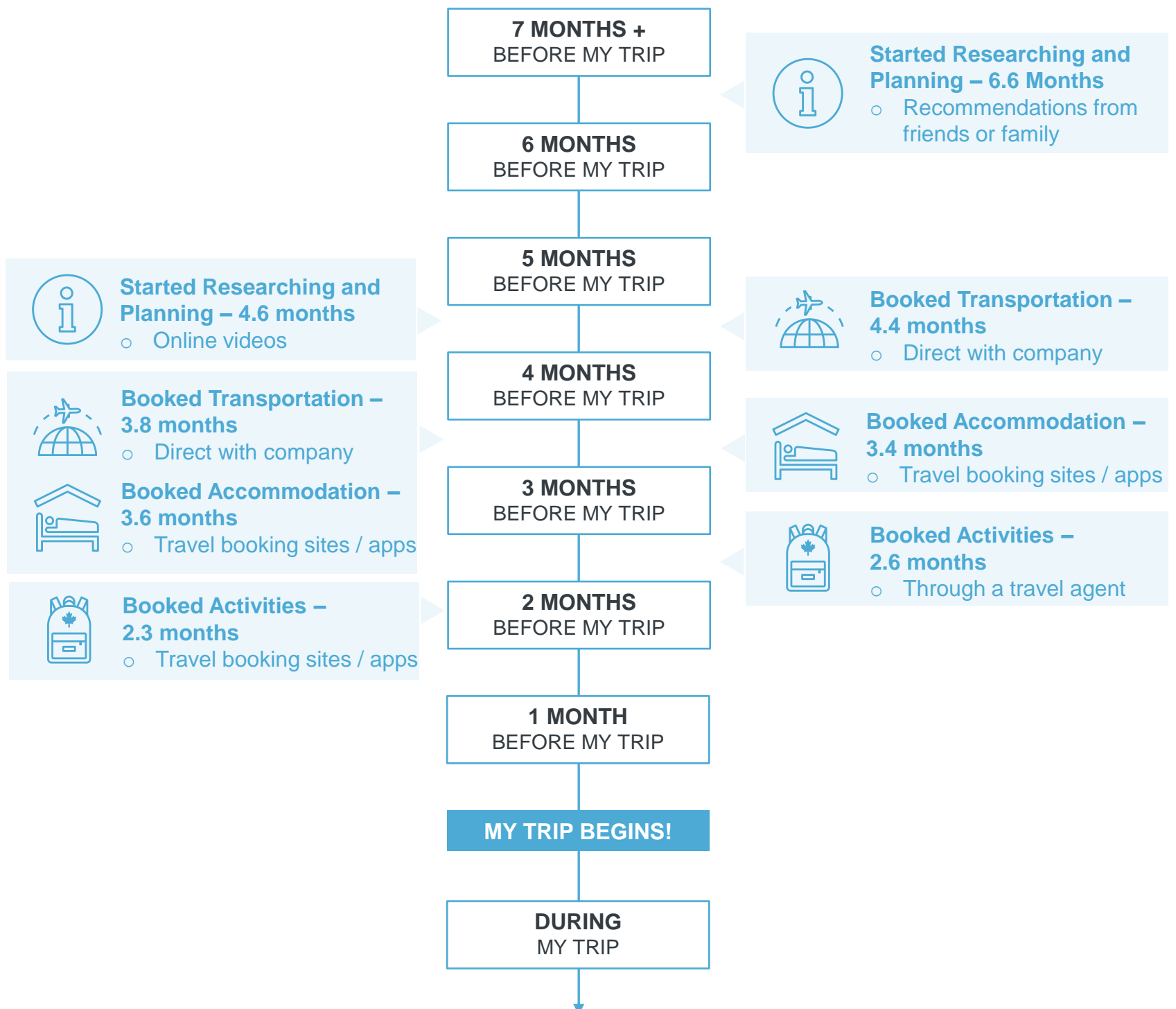
66
INDEX SCORE

! 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





SIMPLICITY LOVERS

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

- Our top trips are seeking comfortable weather, and familiar dining and shopping.
- We also take some trips like City Trippers and 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

SEGMENT ALIGNMENT

36% ¹³⁵
INDEX SCORE



TRIP TYPE	Extended Family		
DESTINATION TYPE	Beach resort		35%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants		40%
	Souvenir shopping		23%
	Amusement parks or theme parks		18%
KEY BEHAVIOURS	Larger group, a safe and reliable destination without surprises, all for the kids		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

13% ¹²¹
INDEX SCORE



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		36%
	Extended family		30%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants		47%
	Religious buildings or sites		24%
	Hiking		12%
KEY BEHAVIOURS	Seeking peaceful small town feel at an affordable price		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

19% ¹³⁹
INDEX SCORE



TRIP TYPE	Urban Centre		
COMPANIONS	Couple only		34%
	Extended family		22%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants		47%
	Visiting famous shopping centres		45%
	Souvenir shopping		45%
KEY BEHAVIOURS	Visiting friends in a familiar city, shopping and dining, spending time together		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

7% ¹⁰²
INDEX SCORE



TRIP TYPE	Historical Site		
COMPANIONS	Couple only		32%
	Nuclear family with kids		25%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Bonding
ACTIVITIES	Museums		43%
	Historical or archeological sites		38%
	Visiting local monuments		35%
KEY BEHAVIOURS	A unique and authentic experience, immersed in a new culture and seeking to learn		



SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- We likely haven't been to Canada before, and don't know too much about it as a travel destination.
- Trips to date have taken us to common tourist destinations in British Columbia, Alberta and Ontario.
- If we are thinking about a trip in the future, it would be to Toronto or Quebec.

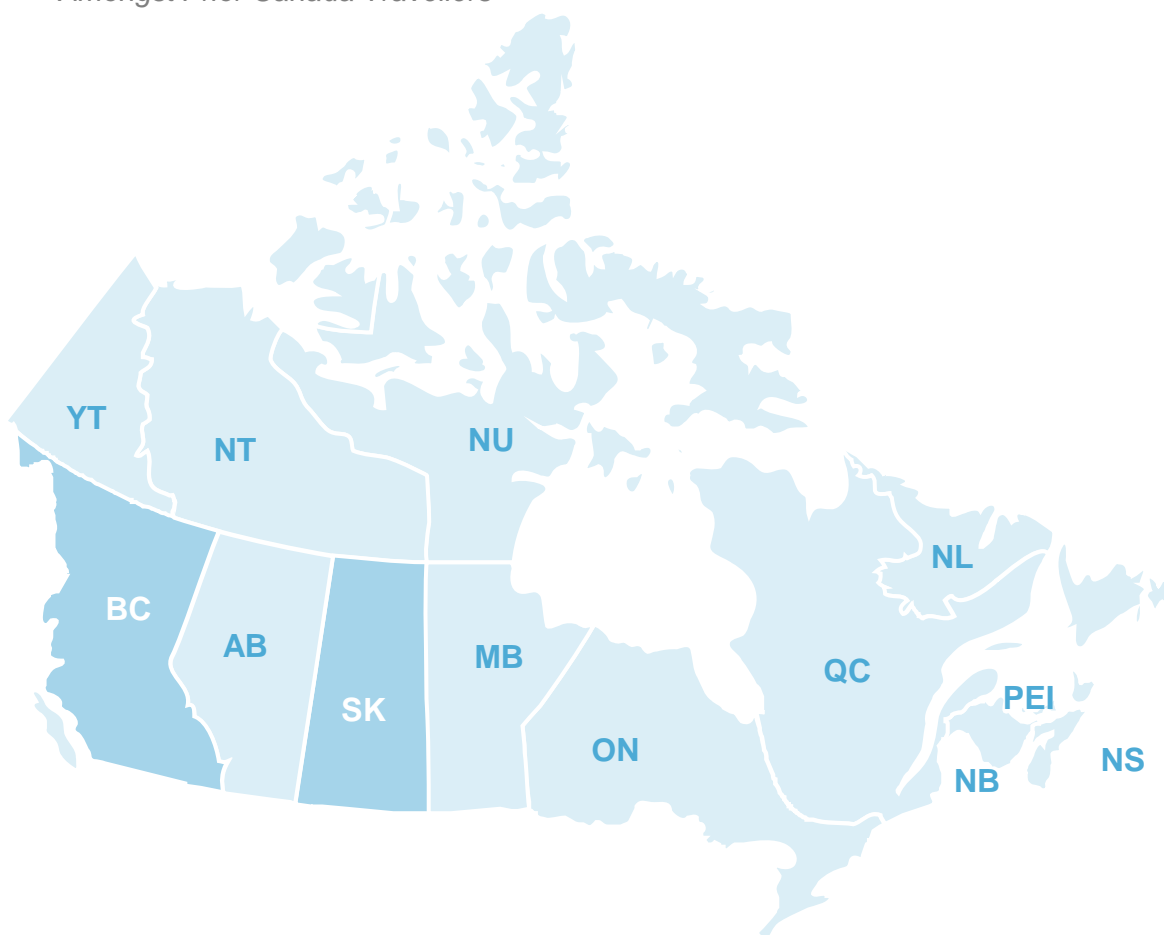


WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	10%	89
BC	20%	117
MB	5%	104
NB	5%	93
NL	5%	96
NS	5%	74
NT	5%	109
NU	0%	55
ON	29%	85
PEI	3%	80
QC	45%	97
SK	4%	120
YT	5%	90



SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- If we have visited, it was a few years ago.
- We will 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	32%	13%	46%	18%
VS. TOTAL MARKET	30%	22%	35%	22%

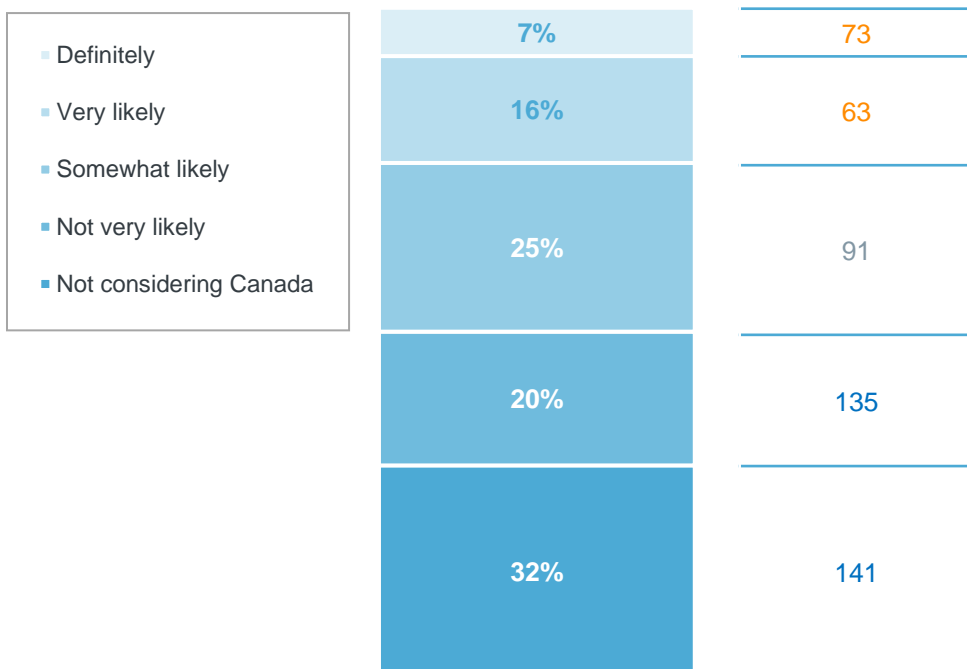
11%

Been to Canada in last 5 years

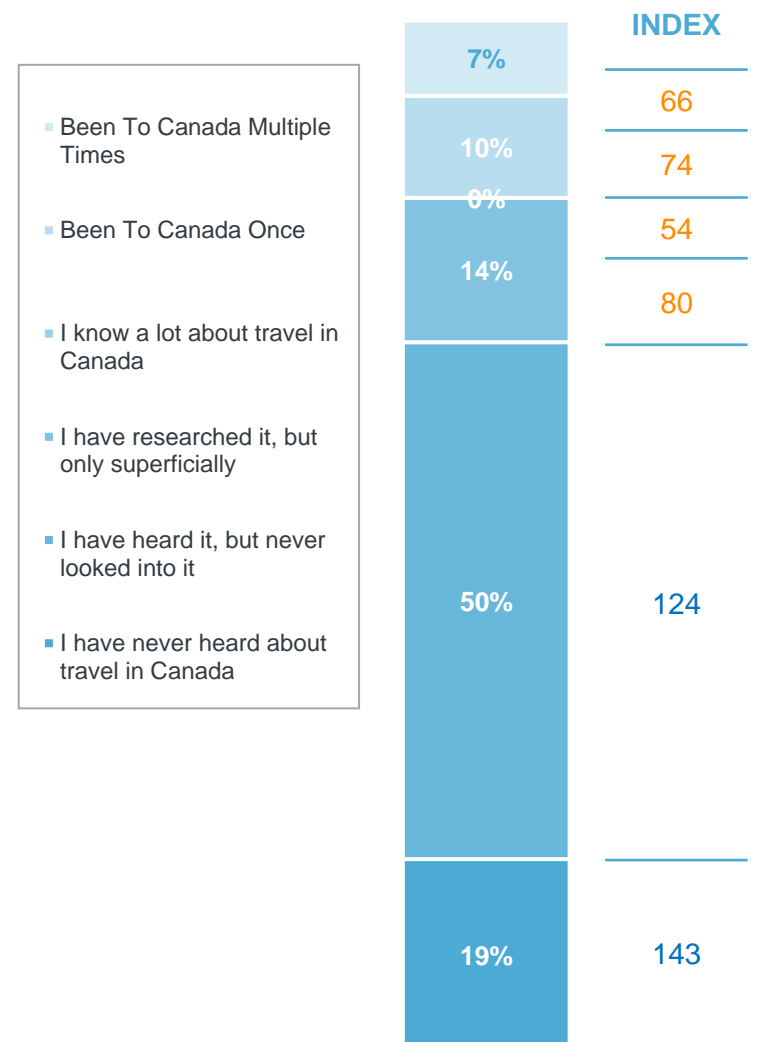
67 INDEX SCORE



LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA





SIMPLICITY LOVERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

- We have either recently changed careers, or perhaps just retired.
- With kids starting to move out, we are investing in our home and personal wellness.



MAJOR LIFE EVENTS IN LAST 5 YEARS

11%

Had a child

88 INDEX SCORE

28%

Started a new job / career

92 INDEX SCORE

5%

Bought a new home

60 INDEX SCORE

8%

Moved to a new city

89 INDEX SCORE

11%

Child started school

83 INDEX SCORE

32%

Purchased a car

62 INDEX SCORE

8%

Retired

146 INDEX SCORE

37%

Renovated house

67 INDEX SCORE



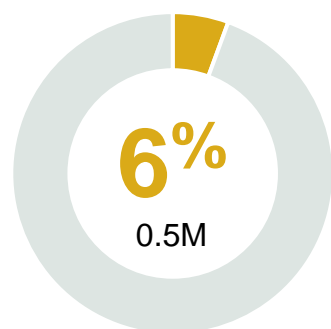
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Personal care and wellness	60%	140
Travel	46%	77
Savings and investments	42%	116
Technology and gadgets	35%	67
Home and decor	34%	133
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	32%	124



FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF MEXICO POPULATION

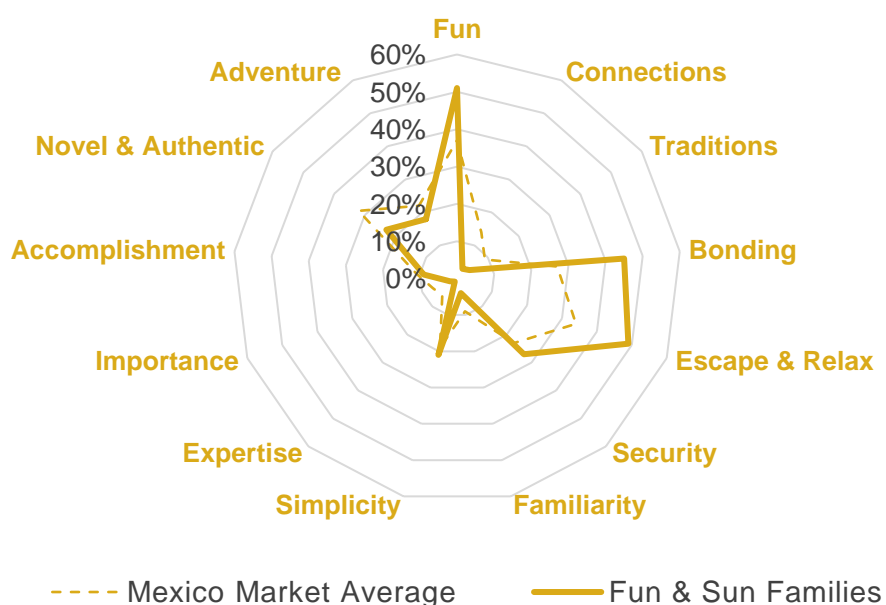
We cherish relaxation and shared family experiences in familiar, kid-friendly, and affordable destinations. We prioritize fun and simplicity over extravagance, gravitating towards well-known beaches and local spots with good communication standards.

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

WHAT YOU NEED TO KNOW ABOUT ME

- 1 We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences.
- 2 Our trips are escapes from everyday life, focusing on creating lasting memories through fun and simple activities.
- 3 We plan our annual vacation a few months in advance, sticking to familiar and reliable destinations.
- 4 Though budget is top of mind, we still view travel as an opportunity to indulge.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

80

How is this calculated?

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



TRAVELLER ECONOMIC INDEX

74

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 fun, convenience, and relaxation, we choose familiar and reliable hotspots to let loose and have fun.
- We see travel as an opportunity to create lasting memories through shared experiences with family.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally don't seek out destinations in order to explore my ancestral heritage	82%	143
I prefer relying on traditional travel resources for planning	74%	136
I generally avoid places that are challenging or difficult to reach	73%	129
I prefer traditional and well-known accommodation options when travelling	73%	137
I generally stick to the most popular areas when I visit somewhere	73%	135
I generally only choose destinations with comfortable climate and weather conditions	71%	129
I prefer destinations with well-established tourist infrastructure	69%	128
I generally don't go out of my way to seek out perspectives from underrepresented communities	67%	128
I don't consider diversity and inclusion factors when choosing travel destinations	64%	132
I don't see the point of posting about my trips on social media	60%	123
While travelling I generally stick to places that are direct and convenient to get to	59%	134
I travel when I need to	40%	120
I generally prefer to go back to the same destinations on holiday	34%	115



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	74%	129
To indulge myself and live in the moment	60%	132
To share quality time with others	56%	154
To find much-needed time to relax	47%	149
To escape the demands of everyday life	43%	138
To bond through shared experiences	34%	148



DESIRED DESTINATION

	SCORE	INDEX
Familiar	88%	145
Fun	73%	133
Safe	71%	141
Charming	39%	145
Carefree	39%	140
Reliable	24%	139



FUN & SUN FAMILIES

OUR DEMOGRAPHICS



OVERALL INSIGHT

- We are aged 25-44, with more than one child.
- We are likely to be female.
- Completed post-secondary education, working, and earning a moderate income.



AGE

	SCORE	INDEX
18-34	27%	67
35-54	60%	149
55+	13%	86
MEAN YEARS	41.8	114



HH INCOME (CAD)*

	SCORE	INDEX
Less than \$900	18%	86
\$900 to <\$6K	70%	131
\$6K or more	7%	88
Refused	5%	131

* HH Income reported by month



EMPLOYMENT

	SCORE	INDEX
Employed FT	62%	108
Employed PT	15%	141
Self-employed	14%	96
Retired	2%	82



EDUCATION

	SCORE	INDEX
Primary education or less	0%	74
Secondary education	1%	62
Post-secondary education	99%	138



53%

60 Have a valid passport



GENDER

44%

63 Male

56%

139 Female

0%

75 Non-binary / Other



HOUSEHOLD

95%

136 Children <18 Living At Home*

10%

80 Children 18+ Living At Home*

2%

79 Children NOT Living At Home*

3%

63 No Children

* Option is not exclusive



MEXICO REGION BREAKOUT

	SCORE	INDEX
South	23%	135
Centre-West	20%	127
Centre-East	18%	134
Northeast	16%	75
Mexico City Metropolitan Area	14%	56
Northwest	8%	80



SOCIO-ECONOMIC LEVEL

	SCORE	INDEX
A / B	47%	77
C+	53%	123



FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS



TRAVEL TRADE INDEX: NON-GROUP

82

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

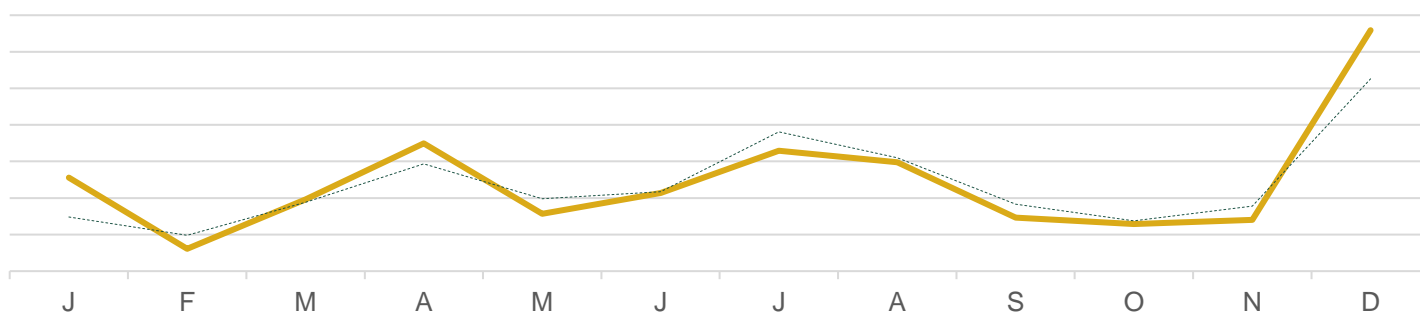
For additional definitions see [Glossary](#)



TYPICAL TRAVEL MONTHS

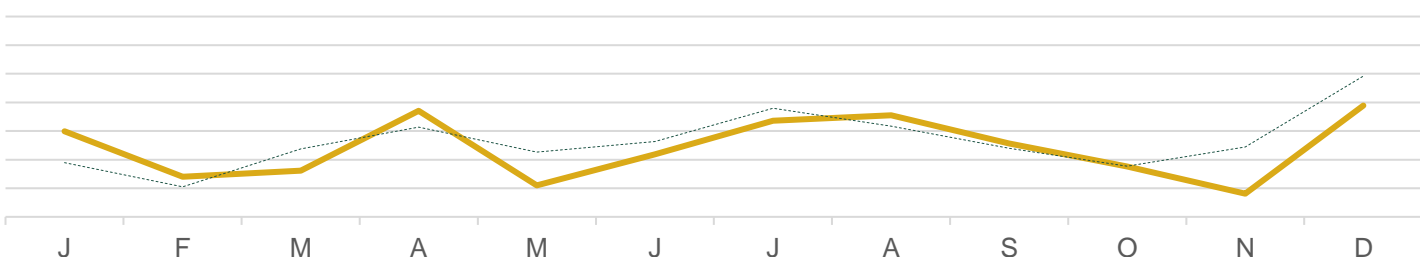
For Flights of 3–7 Hours

— Fun & Sun Families
 Market Average



For Flights of 7+ Hours

— Fun & Sun Families
 Market Average



TRIP DURATION

INDEX

1-2 Days	32%	65
3-5 Days	23%	75
1 Week Holiday	15%	76
2 Weeks Holiday	9%	82
3 Weeks Or More	4%	74

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	51%	101
International Leisure	8%	75
Business Trip	14%	71
Added Personal To Business	6%	67
Worked During Vacation	9%	72

Incidence is frequency of 2+ times per year



FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	54%	108
All-inclusive resort	28%	129
Vacation Rental (e.g., Airbnb, Vrbo)	26%	103
Friend's or family's place	26%	108
Premium Hotel	20%	85
Budget Hotel	5%	121



THOUGHTS ON INDIGENOUS TRAVEL

55%

88 INDEX SCORE

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

9%

78 INDEX SCORE

Strong Interest In Indigenous Activities



WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	81%	149
I really want to learn about the history of the destinations I visit	73%	95
I'm willing to put in the effort while travelling in order to see lesser-known places	41%	66
I'm open to travelling to destinations with limited tourist infrastructure	31%	72
I'm open to visiting destinations with challenging climates or weather conditions	29%	71
I like to explore places that are off the beaten path and less explored	28%	65



FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

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



TRAVEL COMPANIONS

	SCORE	INDEX
Kids	83%	148
Spouse / Partner	83%	138
Adult relatives	20%	77
Solo	2%	59
Friends	1%	61



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$2,280

78
INDEX SCORE

SPEND STYLE

Mid-range to Premium



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	64%	119
I consider the impact that I personally have on the destinations I visit	52%	83
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	49%	88
It's important to me that I visit somewhere that is open to diversity and inclusion	37%	68
Hearing from underrepresented communities is an important part of travelling	33%	72

54%

PRIORITIZE SUSTAINABLE TRAVEL

64 INDEX SCORE

! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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



FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES















OVERALL INSIGHT

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



TOP DESIRED TRAVEL ACTIVITIES

		SCORE	INDEX
	Family-focused attractions	86%	148
○	Amusement parks or theme parks	71%	149
○	Zoos or aquariums	69%	150
○	Space or science centres	17%	103
	Water-based sports	18%	123
○	Swimming	14%	134
○	Scuba diving or snorkeling	9%	123
	Shopping	51%	117
○	Visiting famous shopping centres or areas	35%	118
○	Souvenir shopping	29%	119
	Nature experiences	50%	105
○	Oceanside beaches	36%	119
○	Visit city parks or gardens	18%	122
	Cultural experiences or attractions	50%	76
○	Museums	37%	98
○	Historical or archeological sites	34%	97
	Guided tours	38%	122
	Local cuisine	33%	83
	Festivals and events	30%	103
	Overnight experiences	23%	87
	Health and wellness	20%	109
	Nightlife	19%	82
	Winter-based sports	3%	74



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	90%	151	85%	154
To relax and unwind	84%	157	62%	114
To escape from routine	45%	106	58%	145
For adventure and excitement	28%	94	41%	119
To learn through other cultures	10%	53	34%	83
To be pampered	8%	88	4%	74
For a romantic getaway	12%	94	6%	60
To have memories from top travel spots	9%	73	0%	50
To check off dream travel places	5%	84	0%	56



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3-7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	69%	139	88%	145
Partner / spouse wanted to go	73%	132	71%	125
Visiting friends / family	42%	143	60%	147
Family / friends wanted to go	26%	81	16%	70
Special event (e.g., wedding, reunion)	26%	88	33%	111
Festival or event	4%	41	9%	62

76% 147 INDEX SCORE

Travel aligns with children's school schedule

38% 94 INDEX SCORE

Take time off for vacation during major holidays

23% 71 INDEX SCORE

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



FUN & SUN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

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

51%

Primary Trip Planner

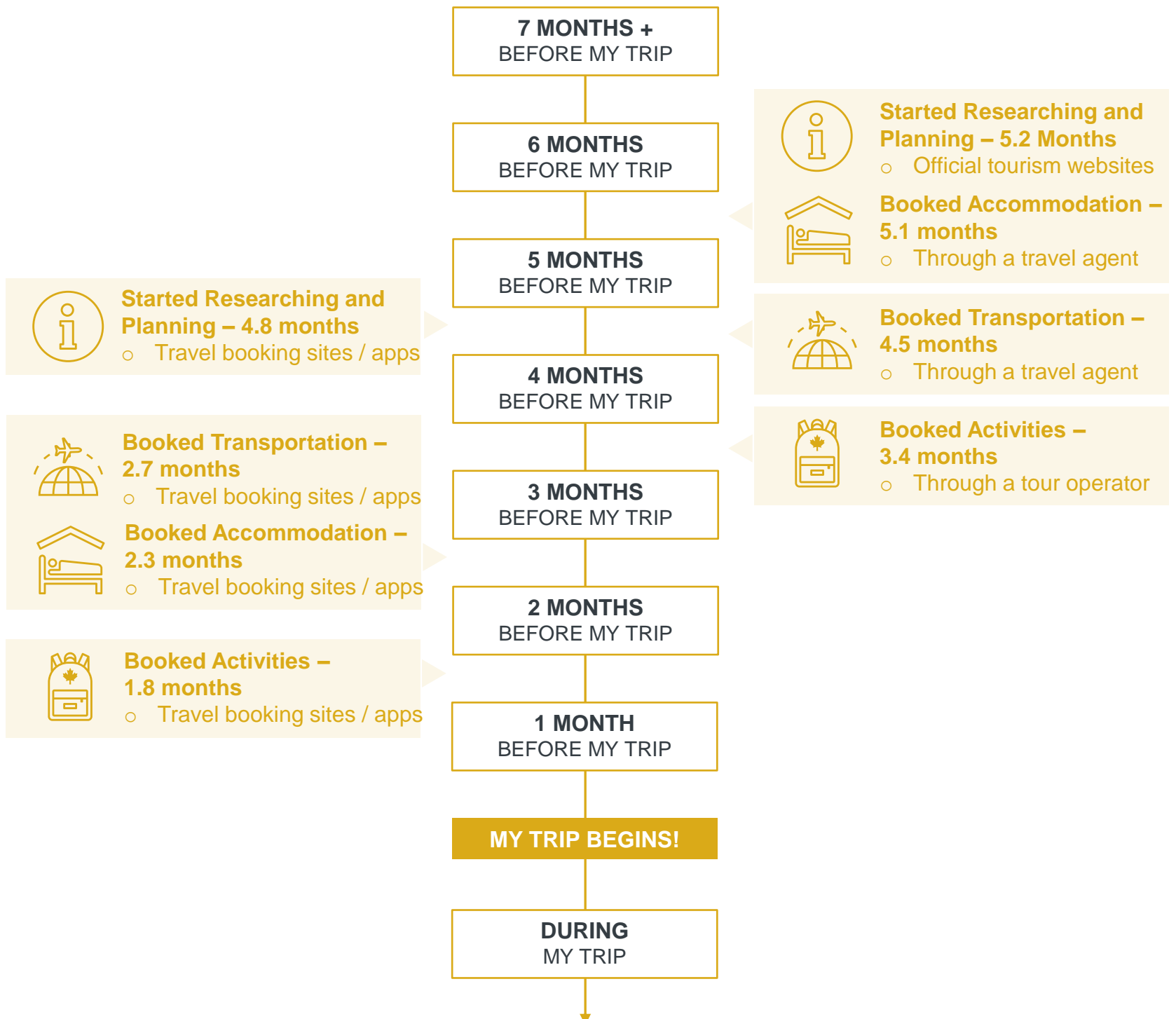
61 INDEX SCORE

! 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





FUN & SUN FAMILIES

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

- Our top trips feature beaches and destinations known for family attractions.
- We also take trips like Purpose Driven 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

35% 175
INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids	63%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants	45%	
	Oceanside beaches	27%	
	Zoos or aquariums	21%	
KEY BEHAVIOURS	Planned in advance, all-inclusive resort, fun and safe destination		

% OF TOTAL TRIPS

10% 110
INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Nuclear family with kids	76%	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Street Cuisine	48%	
	Observing architecture	34%	
	Nature walks	19%	
KEY BEHAVIOURS	Planned last minute, visiting friends, low-impact activities		

% OF TOTAL TRIPS

21% 137
INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Urban Centre		
COMPANIONS	Nuclear family with kids	69%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants	57%	
	Amusement parks	42%	
	Zoos or aquariums	32%	
KEY BEHAVIOURS	Trendy destination with famous kid-friendly attractions		

% OF TOTAL TRIPS

8% 105
INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Adventure Destination		
COMPANIONS	Nuclear family with kids	49%	
	Couple only	30%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Novel & Authentic
ACTIVITIES	Historical or archeological sites	36%	
	Zoos or aquariums	32%	
	Cultural or traditional festivals	17%	
KEY BEHAVIOURS	Higher budget, open to new destinations and activities, seeking excitement		



FUN & SUN FAMILIES

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

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

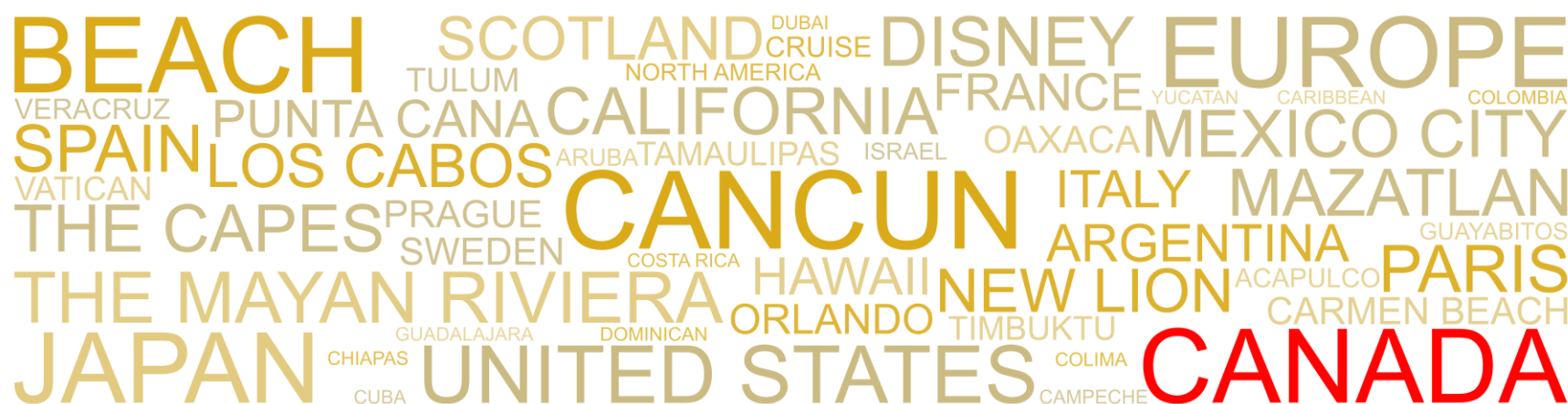


WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Mexico	75%	139	Argentina	1%	81
US	12%	76	France	1%	66
Canada	3%	68	Italy	1%	59
Spain	2%	57	Brazil	1%	85
Costa Rica	2%	133	Peru	1%	92



WHERE DO WE WANT TO GO



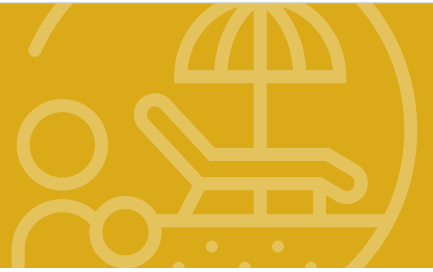
DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	94%	141
Is easy to travel to	56%	141
Is not too expensive	46%	129
Has a mild and pleasant climate	42%	127
Offers all-inclusive resort packages	40%	135
Has packaged holiday / vacation offers	36%	140
Good connectivity (Wi-Fi, cell service, etc.)	33%	140
Doesn't take too long to get there	21%	137



FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- We likely haven't been to Canada before, and don't know too much about it as a travel destination.
- To date, any travel to Canada has primarily been to Ontario or Quebec, and focussed on summer months, spilling into September.
- Generally, we are not planning a future visit.



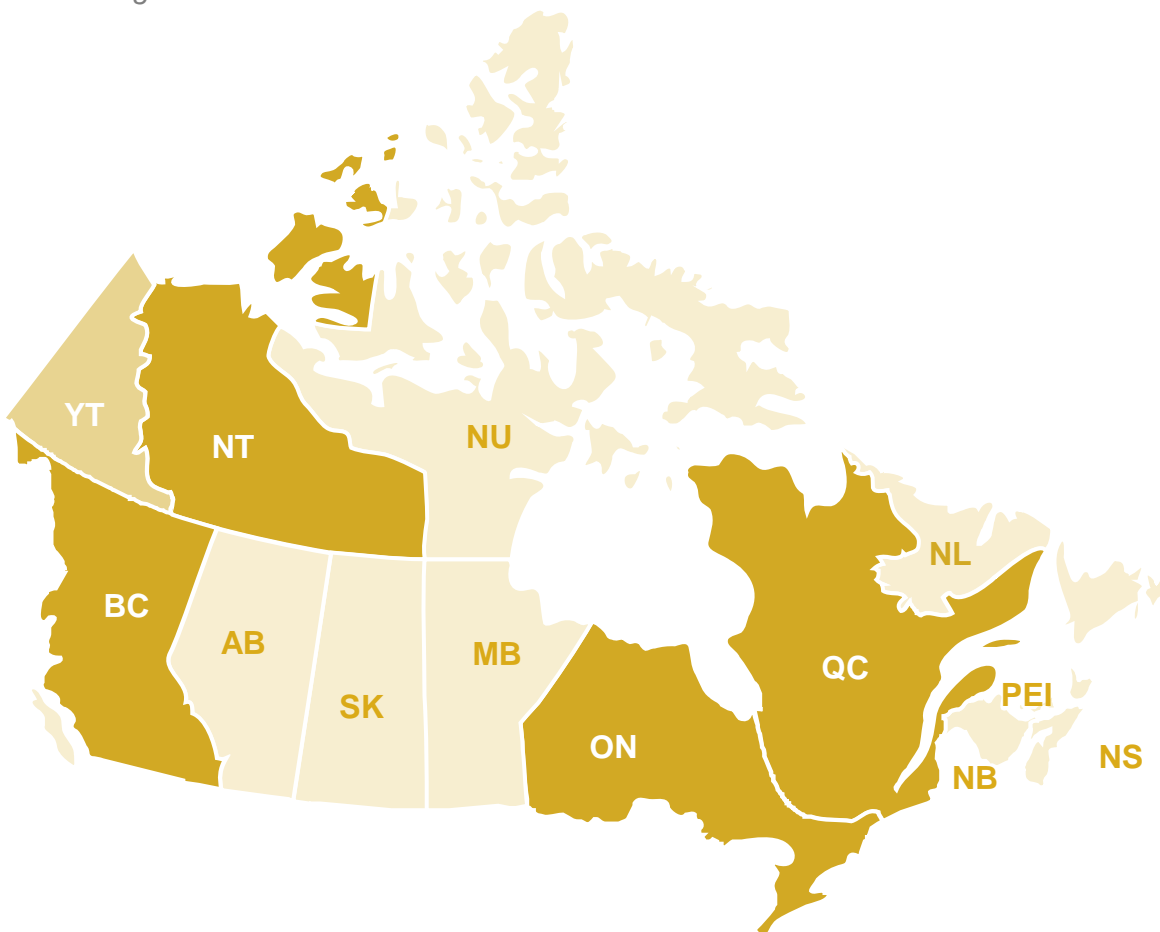
WHERE DO WE WANT TO GO IN CANADA

VANCOUVER
CANADA
NIAGARA
MONTREAL
BRITISH COLUMBIA
TORONTO
OTTAWA
QUEBEC
VICTORIA
WHISTLER
ONTARIO



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	10%	90
BC	23%	133
MB	0%	56
NB	0%	54
NL	0%	49
NS	0%	55
NT	8%	150
NU	0%	55
ON	68%	157
PEI	0%	46
QC	58%	153
SK	0%	58
YT	9%	123



FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- If we have visited, it was a few years ago.
- Our knowledge of Canada as a travel destination is limited.



CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	32%	6%	38%	37%
VS. TOTAL MARKET	30%	22%	35%	22%

10%

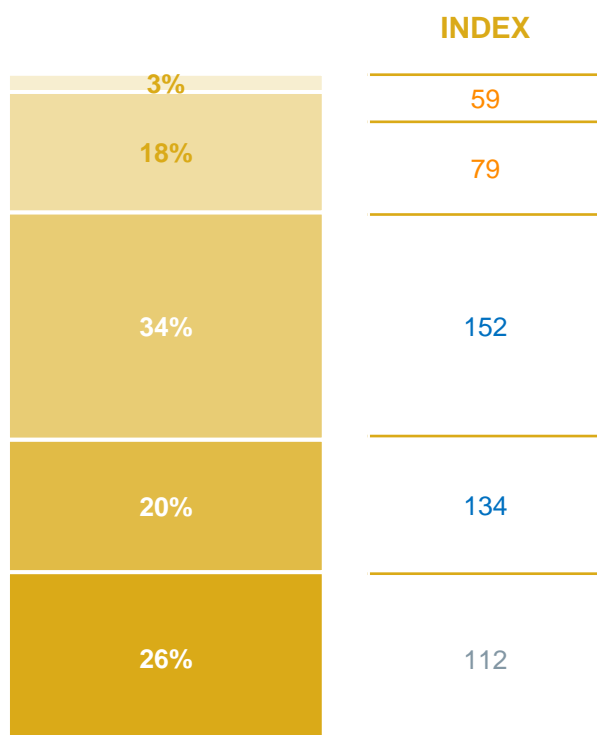
Been to Canada in last 5 years

64 INDEX SCORE



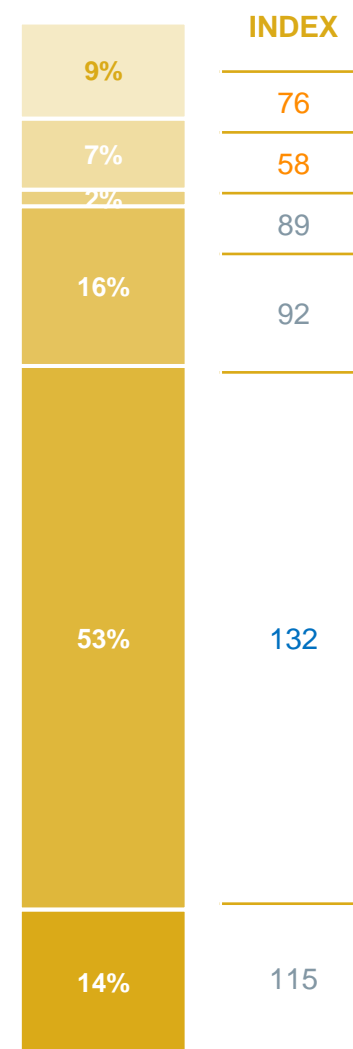
LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

- Definitely
- Very likely
- Somewhat likely
- Not very likely
- Not considering Canada



FAMILIARITY WITH CANADA

- Been To Canada Multiple Times
- Been To Canada Once
- I know a lot about travel in Canada
- I have researched it, but only superficially
- I have heard it, but never looked into it
- I have never heard about travel in Canada





FUN & SUN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

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



MAJOR LIFE EVENTS IN LAST 5 YEARS

31%

Had a child

145 INDEX SCORE

24%

Started a new job / career

77 INDEX SCORE

12%

Bought a new home

117 INDEX SCORE

12%

Moved to a new city

126 INDEX SCORE

43%

Child started school

149 INDEX SCORE

39%

Purchased a car

85 INDEX SCORE

2%

Retired

80 INDEX SCORE

41%

Renovated house

101 INDEX SCORE



NON-ESSENTIAL SPENDING PRIORITIES

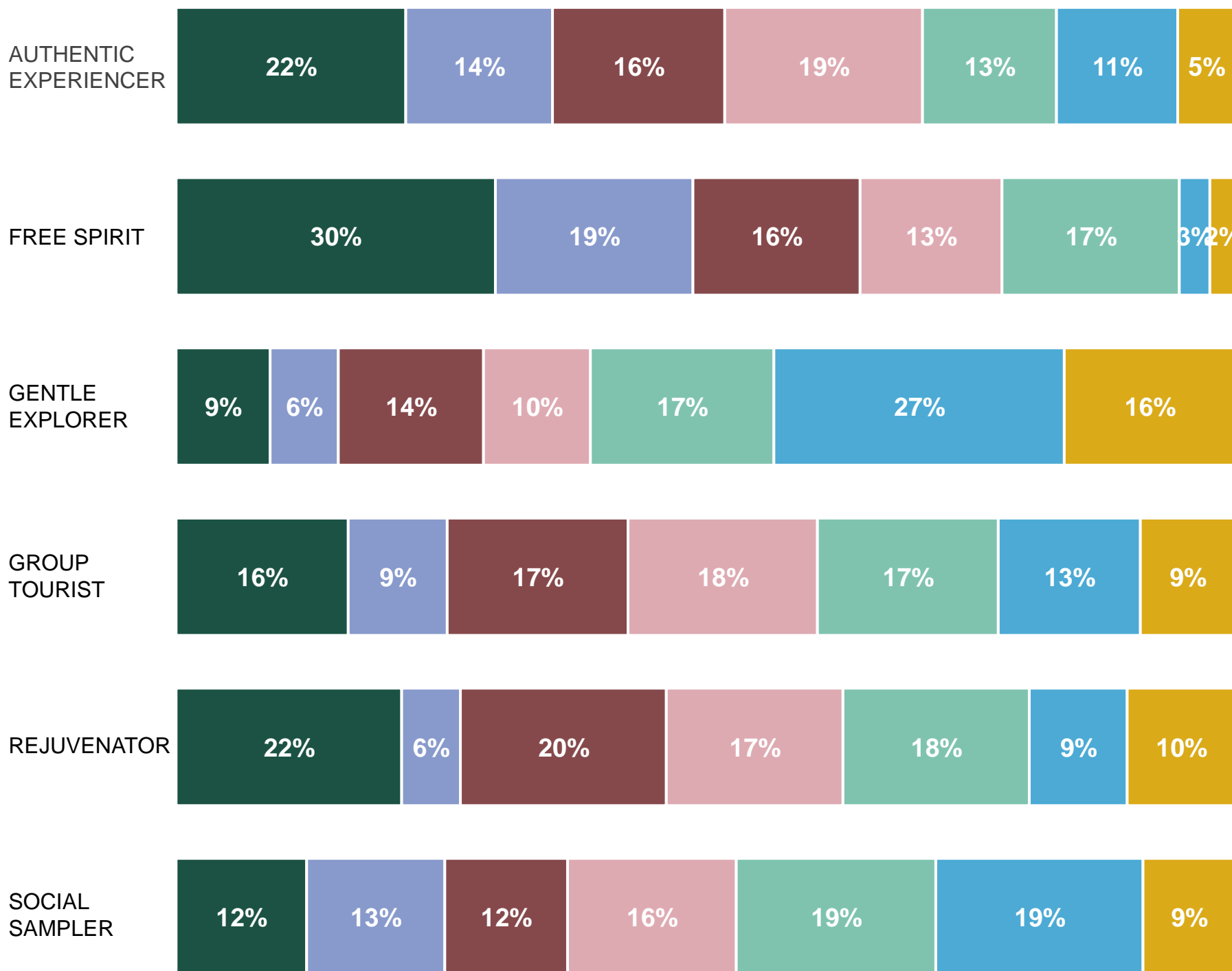
	SCORE	INDEX
Personal care and wellness	55%	108
Travel	50%	90
Savings and investments	44%	138
Technology and gadgets	36%	75
Home and decor	31%	120
Fashion and accessories	29%	99



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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To feel like I've accomplished something.</i> • <i>To push my limits and challenge myself.</i>
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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To have experiences I am proud to tell others about.</i> • <i>To feel a sense of adventure.</i>
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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To share quality time with others.</i> • <i>To bond and create lasting memories through shared experiences.</i>
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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To feel connected with new people.</i>
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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To escape the demands of everyday life.</i> • <i>To find much-needed time to relax.</i> • <i>To let loose and forget about day-to-day life.</i>



GLOSSARY

DETAILS AND DEFINITIONS

<p>EMOTIONAL TRAVEL MOTIVATION: EXPERTISE</p>	<p>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</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To feel like a travel expert.</i>
<p>EMOTIONAL TRAVEL MOTIVATION: FAMILIARITY</p>	<p>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.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To be familiar with my surroundings.</i> • <i>To feel like a local.</i>
<p>EMOTIONAL TRAVEL MOTIVATION: FUN</p>	<p>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.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To just enjoy myself and have fun.</i> • <i>To indulge myself and live in the moment.</i> • <i>To have a fun, social setting.</i>
<p>EMOTIONAL TRAVEL MOTIVATION: IMPORTANCE</p>	<p>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.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To feel like I'm important.</i>
<p>EMOTIONAL TRAVEL MOTIVATION: NOVEL & AUTHENTIC</p>	<p>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 originality in their journeys, immersing themselves in different cultures and engaging in genuine and authentic interactions.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To have authentic experiences.</i> • <i>To open my mind to new perspectives.</i> • <i>To explore and discover new things and places.</i>
<p>EMOTIONAL TRAVEL MOTIVATION: SECURITY</p>	<p>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.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To feel welcomed.</i> • <i>To feel safe and secure.</i>



GLOSSARY

DETAILS AND DEFINITIONS

EMOTIONAL TRAVEL MOTIVATION: SIMPLICITY	<p>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.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To enjoy the simplicity of easy, straightforward travel.</i> • <i>To feel confident of no surprises; I'll get exactly what I expected.</i>
EMOTIONAL TRAVEL MOTIVATION: TRADITIONS	<p>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.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • <i>To create new, or take part in old, traditions.</i>
FUNCTIONAL BENEFITS	<p>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</p>	
NON-TRAVELLER	<p>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.</p>	
PRIMARY TRIP PLANNER	<p>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.</p>	
PRIORITIZE SUSTAINABLE TRAVEL	<p>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.</p>	
SEGMENT ALIGNMENT	<p>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</p>	
SHORT / MID / LONG HAUL	<p>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</p>	



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).