UNITED KINGDOM MARKET PROFILES

The UK travel market is known for its global outlook and strong passion for international travel. British travellers seek escapes that blend adventure, bonding experiences, and relaxation, gravitating towards destinations that are both friendly and inclusive.

Their diverse preferences span from high-end luxury getaways to budget-conscious adventures, reflecting the wide range of experiences they pursue when traveling abroad.

UNITED KINGDOM

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

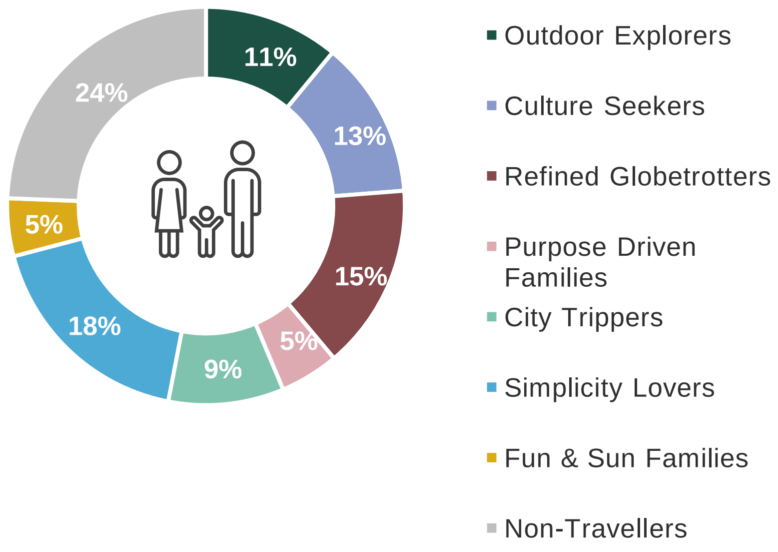
- UK travellers primarily seek fun and relaxation through leisure travel, using it as a mean to truly disconnect, escape, and focus on personal well-being..
- Most international travel is often to neighbouring countries that are easy and affordable to access, though long-haul trips can fit into annual plans.
- Preferred destinations are friendly, social, inclusive and safe.

The UK market strongly overindexes in terms of Refined Globetrotters and Simplicity Lovers compared to other markets. British travellers often seek hidden gems and destinations that offer a blend of peaceful escapes and vibrant cultural attractions.

British tourists are less swayed by social media trends, favoring sociable, inclusive destinations that offer authentic experiences. They prioritize easy-to-navigate locations where they can immerse themselves in local culture while enjoying a break from the demands of everyday life.

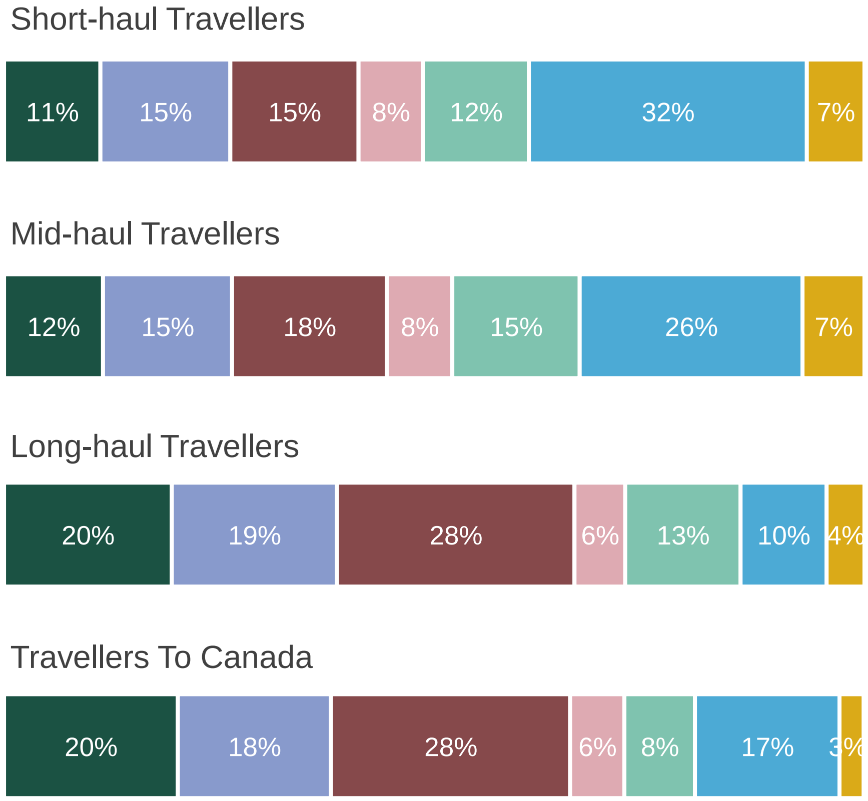
MARKET SIZING

POPULATION BREAKDOWN



23.9% of the adult population in the UK (est. **53M**) are non-travellers (est. **13M**). Reasons for not travelling are often financial or health related.

OUTBOUND TRAVELLERS' BREAKDOWN



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

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

MARKET SEGMENTS OVERVIEW

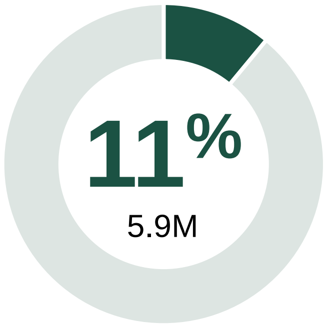
	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	**5.9M**	**Yes**	○ Nature Experiences ○ Guided Tours ○ Winter Sports	○ Adventure ○ Novel & Authentic ○ Accomplishment
CULTURE SEEKERS	**6.7M**	No	○ Cultural Experiences & Attractions ○ Festivals & Events ○ Cuisine	○ Novel & Authentic ○ Connections ○ Familiarity
REFINED GLOBETROTTERS	**8.0M**	**Yes**	○ Cultural Experiences & Attractions ○ Cuisine ○ Guided Tours	○ Novel & Authentic ○ Bonding ○ Security
PURPOSE DRIVEN FAMILIES	**2.5M**	No	○ Family-Focused Attractions ○ Nature Experiences ○ Cultural Experiences & Attractions	○ Bonding ○ Novel & Authentic ○ Security
CITY TRIPPERS	**4.9M**	No	○ Cuisine ○ Nightlife ○ Shopping	○ Fun ○ Escape & Relax ○ Bonding
SIMPLICITY LOVERS	**9.4M**	No	○ Cuisine ○ Nature Experiences ○ Shopping	○ Escape & Relax ○ Security ○ Simplicity
FUN & SUN FAMILIES	**2.5M**	No	○ Family-Focused Attractions ○ Shopping ○ Casual Sports	○ Escape & Relax ○ Bonding ○ Fun

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

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

OUTDOOR EXPLORERS

PSYCHOGRAPHICS – SUMMARY



% OF UNITED KINGDOM POPULATION

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

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

WHAT YOU NEED TO KNOW ABOUT ME

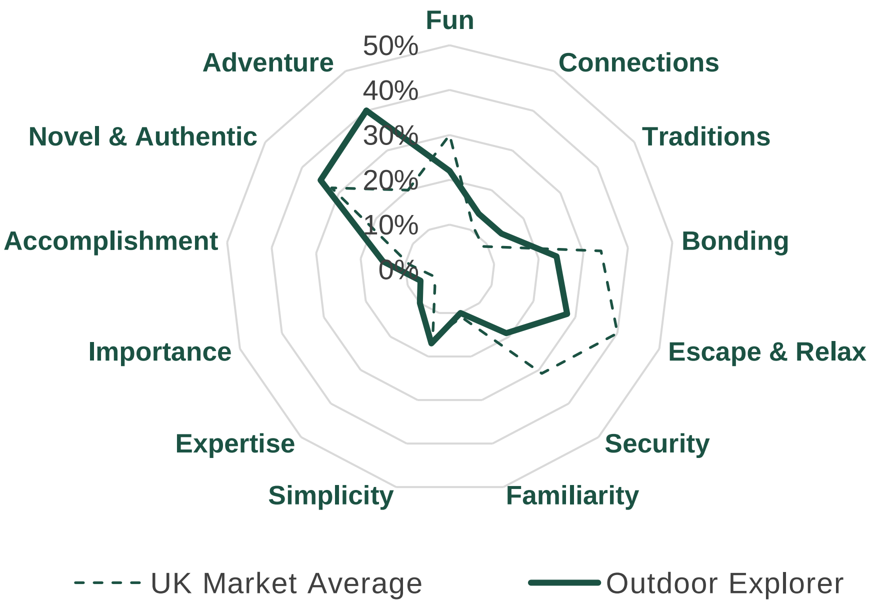
1 We love travel and take all types of trips (domestic / international / business / bleisure).

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

3 Spontaneous yet savvy travellers, we rely on online resources and apps for trip planning and booking.

4 We want to feel carefree in remote environments, living in the moment.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

112

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

112

How is this calculated?

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

OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	**80%**	113
I'm always on the look out for new destinations to visit next	**78%**	119
I like my holiday to have some form of physical activity	**77%**	147
I generally think natural attractions are the highlights of my trip	**76%**	150
I'm passionate about travelling	**76%**	122
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	**69%**	111
I go where I want to go, no matter the hurdles	**67%**	139
I'm open to unconventional accommodations when travelling	**53%**	139
I enjoy living in the moment while travelling and don't worry much about what comes next	**48%**	137
I feel best on vacation when being highly active	**47%**	135
I like to keep my travel plans flexible and often book on short notice	**39%**	130
I seek out destinations where I can explore my ancestral heritage	**36%**	125
I'd be open to using AI-powered chatbots for travel planning and assistance	**30%**	129

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel a sense of adventure	**51%**	150
To be proud to share my travel experiences	**29%**	140
To push my limits and challenge myself	**15%**	147
To feel like I've accomplished something	**15%**	129
To create new, or take part in old, traditions	**14%**	134
To feel like a travel expert	**10%**	139

DESIRED DESTINATION

	SCORE	INDEX
Adventurous	**56%**	155
Unique	**26%**	122
Unexplored	**25%**	155
Carefree	**20%**	129
Free-Spirited	**20%**	138
Passionate	**16%**	127

OUTDOOR EXPLORERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are likely under 35 years old and have just started having children.
- We are working full time, earning a moderate income.

AGE

	SCORE	INDEX
18-34	**41%**	128
35-54	**35%**	104
55+	**24%**	80
MEAN YEARS	**42.7**	78

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	**21%**	100
>$40K to $120K	**66%**	101
More than $120K	**10%**	106
Refused	**3%**	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	**56%**	122
Employed PT	**9%**	83
Self-employed	**7%**	128
Retired	**16%**	86

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	120
Secondary education	**19%**	76
Post-secondary education	**80%**	123

73%

103 Have a valid passport

GENDER

55%	120	Male
45%	82	Female
0%	83	Non-binary / Other

HOUSEHOLD

34%	104	Children <18 Living At Home*
7%	70	Children 18+ Living At Home*
15%	80	Children NOT Living At Home*
51%	107	No Children

** Option is not exclusive*

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX
Greater London	**20%**	113
South East	**14%**	105
South West	**11%**	132
West Midlands	**10%**	112
North West	**10%**	82
East of England	**8%**	82
Yorkshire and The Humber	**7%**	77
Scotland	**6%**	63
East Midlands	**5%**	88
North East	**5%**	112
Wales	**5%**	83

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

97

TRAVEL TRADE INDEX: **GROUP**

131

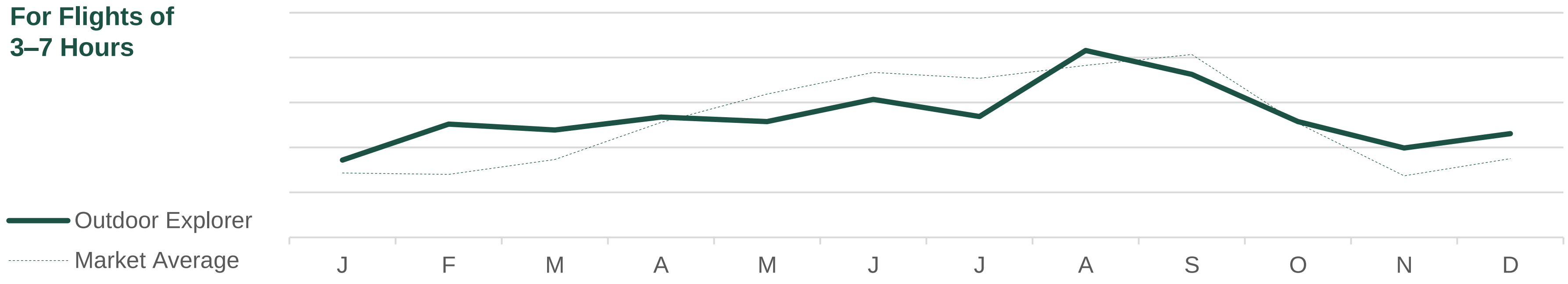
KEY terminology on this page

- **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

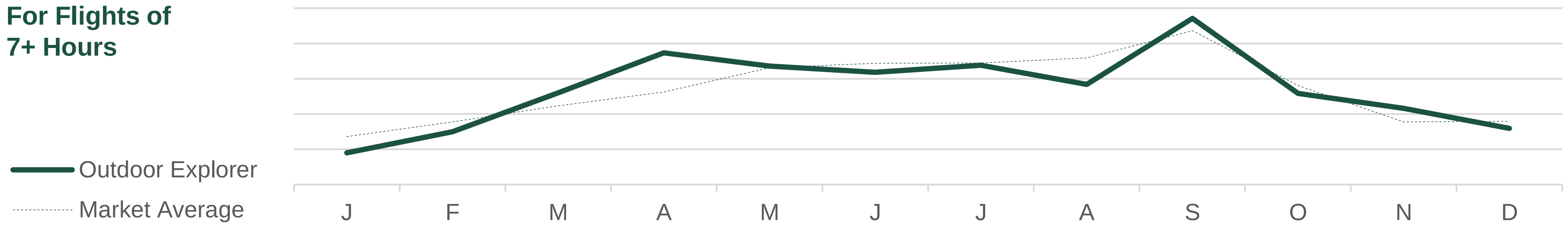
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	**31%**	75
3-5 Days	**25%**	111
1 Week Holiday	**20%**	117
2 Weeks Holiday	**12%**	113
3 Weeks Or More	**6%**	110

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	**41%**	71
International Leisure	**24%**	96
Business Trip	**13%**	115
Added Personal To Business	**8%**	119
Worked During Vacation	**9%**	122

Incidence is frequency of 2+ times per year

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**43%**	96
Vacation Rental (e.g., Airbnb, Vrbo)	**22%**	111
Premium Hotel	**20%**	89
Friend's or family's place	**15%**	96
All-inclusive resort	**15%**	88
Bed & Breakfast	**14%**	115

THOUGHTS ON INDIGENOUS TRAVEL

56%

112 INDEX SCORE

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

16%

128 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I like to explore places that are off the beaten path and less explored	**79%**	139
I'm willing to put in the effort while travelling in order to see lesser-known places	**73%**	134
I really want to learn about the history of the destinations I visit	**71%**	105
You only ever get to know a country by experiencing its culture	**68%**	79
I'm open to travelling to destinations with limited tourist infrastructure	**63%**	133
I'm open to visiting destinations with challenging climates or weather conditions	**56%**	140

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	**54%**	85
Adult relatives	**22%**	91
Kids	**20%**	99
Solo	**19%**	122
Friends	**11%**	99

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,850

111
INDEX SCORE

SPEND STYLE

Premium / Upscale

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**54%**	105
I consider the impact that I personally have on the destinations I visit	**53%**	111
It's important to me that I visit somewhere that is open to diversity and inclusion	**48%**	103
Hearing from underrepresented communities is an important part of travelling	**45%**	116
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**39%**	116

48%

PRIORITIZE SUSTAINABLE TRAVEL

116 INDEX SCORE

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

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

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- All sports are of interest, we are not deterred by a challenging new activity.
- Overnight experiences seek adventure as well, staying in a cabin or taking a road trip.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	**60%**	146
○ Nature walks	**35%**	141
○ Viewing wildlife in natural habitat	**33%**	149
○ Explore wilderness or backcountry	**23%**	148
Water-based sports	**25%**	149
○ Swimming	**15%**	144
○ Kayaking, canoeing, or paddle-boarding	**11%**	151
High-intensity sports	**13%**	141
○ Mountain biking	**6%**	146
○ Whitewater rafting	**4%**	141
Winter-based sports	**14%**	131
○ Snowboarding or downhill skiing	**7%**	137
○ Snowshoeing or cross-country skiing	**4%**	138
Casual sports	**15%**	139
○ Casual biking	**5%**	121
○ Road cycling	**5%**	130
Cultural experiences or attractions	**50%**	85
Local cuisine	**34%**	70
Guided tours	**29%**	112
Family-focused attractions	**28%**	98
Festivals and events	**25%**	104
Overnight experiences	**21%**	111
Shopping	**16%**	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	**52%**	61	**63%**	85
To escape from routine	**39%**	85	**39%**	96
For adventure and excitement	**37%**	132	**39%**	117
To spend time with family	**34%**	85	**36%**	88
To learn through other cultures	**23%**	107	**27%**	100
To check off dream travel places	**21%**	122	**34%**	139
To have fun with friends	**18%**	93	**10%**	78
To have memories from top travel spots	**19%**	144	**20%**	127
For a romantic getaway	**10%**	72	**8%**	87

EXTERNAL TRIP TRIGGERS

	SCORE	**INDEX**	**SCORE**	**INDEX**
Partner / spouse wanted to go	**42%**	81	**43%**	95
Family / friends wanted to go	**33%**	100	**29%**	100
Visiting friends / family	**18%**	86	**22%**	74
Special event (e.g., wedding, reunion)	**20%**	105	**14%**	87
Festival or event	**22%**	122	**15%**	93
Kids wanted to go	**31%**	109	**19%**	100

21% 99 INDEX SCORE

Travel aligns with children's school schedule

26% 103 INDEX SCORE

Take time off for vacation during major holidays

16% 121 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.

72%

Primary Trip Planner

127
INDEX SCORE

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

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

FLIGHT OF
3–7 HOURS

FLIGHT OF
7+ HOURS

7 MONTHS +
BEFORE MY TRIP

Started Researching and Planning – 6.1 Months
- Travel review sites
- Travel booking sites / apps

6 MONTHS
BEFORE MY TRIP

5 MONTHS
BEFORE MY TRIP

Booked Transportation – 4.7 months
- Direct with company

Booked Accommodation – 4.5 months
- Travel booking sites / apps

4 MONTHS
BEFORE MY TRIP

Started Researching and Planning – 3.6 months
- Travel booking sites / apps
- Travel provider websites

3 MONTHS
BEFORE MY TRIP

Booked Activities – 2.9 months
- Travel booking sites / apps

Booked Transportation – 2.9 months
- Travel booking sites / apps

2 MONTHS
BEFORE MY TRIP

Booked Accommodation – 2.5 months
- Travel booking sites / apps

Booked Activities – 1.5 months
- Travel booking sites / apps

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips are to nature or mountain destinations.
- At times we take trips like Culture Seekers or Refined Globetrotters.

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

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

% OF TOTAL TRIPS

8% 108 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Wildlife & Nature Reserve		
COMPANIONS	Couple only	**39%**	
	Extended family	**21%**	
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Adventure
ACTIVITIES	Viewing wildlife in natural habitat	**57%**	
	Nature walks	**53%**	
	Wildlife or nature tours	**24%**	
KEY BEHAVIOURS	Seeking novel and off-the-beaten path access to wildlife and landscapes		

% OF TOTAL TRIPS

6% 93 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Mountain Retreat		
COMPANIONS	Extended family	**28%**	
	Alone	**22%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Adventure
ACTIVITIES	Mountain biking	**22%**	
	See or explore mountains	**21%**	
	Snowboarding or downhill skiing	**16%**	
KEY BEHAVIOURS	Larger group, seeking authentic mountain town and adventure sports		

% OF TOTAL TRIPS

19% 105 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre	**27%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Local restaurants	**39%**	
	Museums	**26%**	
	Historical or archeological sites	**23%**	
KEY BEHAVIOURS	Seeking relaxation and cultural exploration in a unique city		

% OF TOTAL TRIPS

33% 140 INDEX SCORE

SEGMENT ALIGNMENT

● ● ○ ○ ○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort	**21%**	
	Small cities and town	**17%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants	**47%**	
	Visiting local monuments	**29%**	
	Outdoor markets	**19%**	
KEY BEHAVIOURS	Relaxing down-time, less active, may be a beach destination or cruise		

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

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

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	**27%**	85	Italy	**3%**	88
USA	**8%**	119	Austria	**3%**	149
Spain	**8%**	67	Canada	**2%**	143
France	**6%**	102	Germany	**2%**	107
Greece	**5%**	79	Australia	**2%**	136

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	**54%**	148
Provide access to unique natural wonders	**42%**	146
Provides opportunities to view wildlife in its natural habitat	**37%**	146
Provides numerous opportunities for outdoor adventures	**36%**	157
Has many hidden gems	**32%**	126
Offers natural landscapes in close proximity to city amenities	**26%**	123
Provides a remote, no-frills experience	**17%**	150
Offers options for adrenaline seekers	**10%**	143

OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

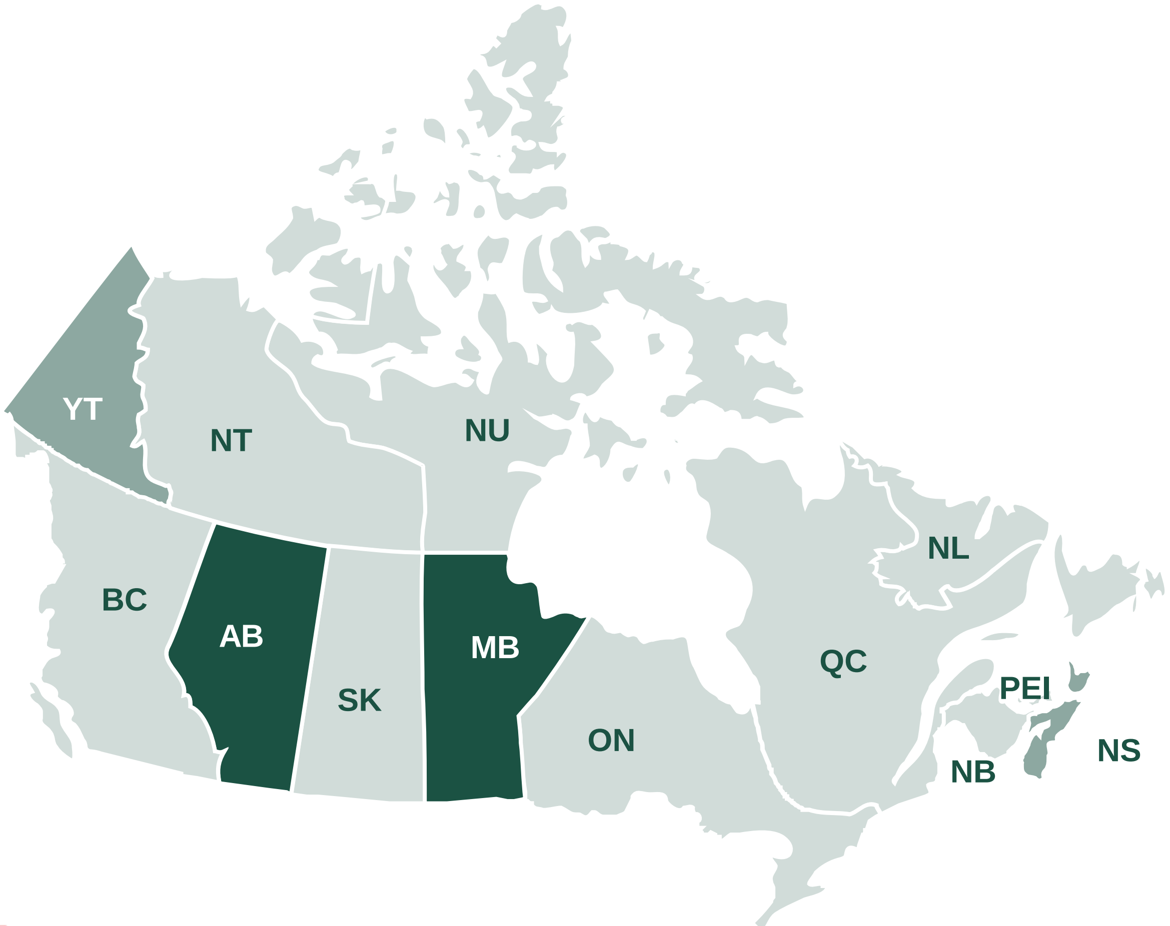
- We have likely been to Canada before, and more than once.
- We are most interested in British Columbia, Alberta, Nova Scotia, and the Territories.
- While Canada is on our future travel list, we also think about North America as a destination in itself.

WHERE DO WE WANT TO GO IN CANADA

BANFF PRINCE EDWARD ISLAND VANCOUVER
WHISTLER ST. JOHN'S OTTAWA KELOWNA MONTREAL
VICTORIA ISLAND THE ROCKIES NOVA SCOTIA
CALGARY ALBERTA TORONTO PRAIRIES QUEBEC
YUKON LAKE LOUISE
NATIONAL PARKS HALIFAX NEW BRUNSWICK
CHURCHILL LONDON BRITISH COLUMBIA
NIAGARA FALLS NEWFOUNDLAND ONTARIO

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	31%	139
BC	41%	114
MB	9%	128
NB	7%	111
NL	8%	112
NS	15%	117
NT	6%	108
NU	2%	95
ON	40%	67
PEI	5%	95
QC	24%	81
SK	6%	111
YT	4%	115

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- We are most likely to visit in the Spring and Summer.
- Those of us who haven't visited, are definitely interested and thinking about it.

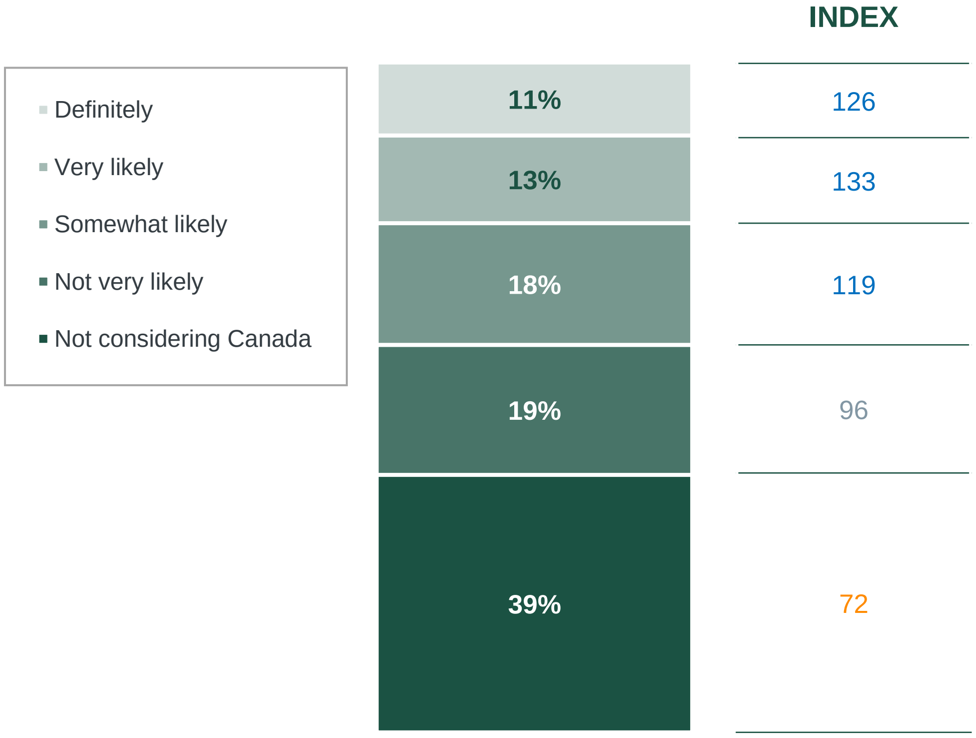
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	**17%**	**30%**	**53%**	**26%**
VS. TOTAL MARKET	17%	29%	46%	29%

18% Been to Canada in last 5 years

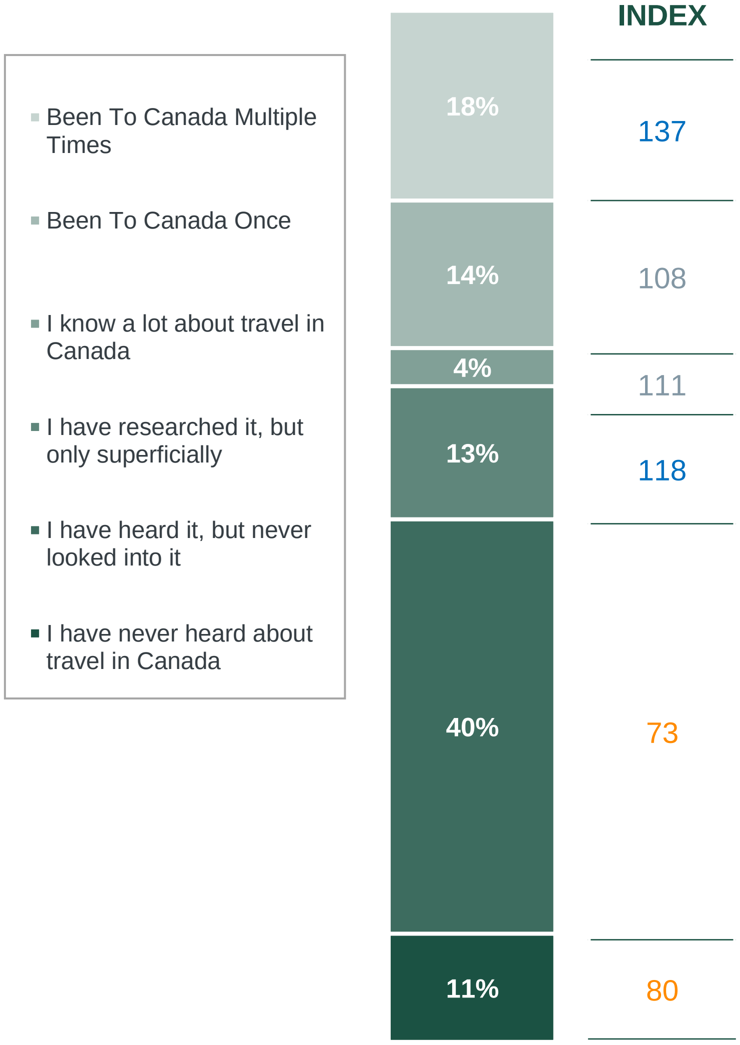
127 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



		INDEX
Definitely	11%	126
Very likely	13%	133
Somewhat likely	18%	119
Not very likely	19%	96
Not considering Canada	39%	72

FAMILIARITY WITH CANADA



		INDEX
Been To Canada Multiple Times	18%	137
Been To Canada Once	14%	108
I know a lot about travel in Canada	4%	111
I have researched it, but only superficially	13%	118
I have heard it, but never looked into it	40%	73
I have never heard about travel in Canada	11%	80

OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Among our youngest – we are building our lives and starting to make big moves.
- We have recently purchased a car, started a new job, or moved to a new city.
- Some of us are building families, having children or seeing kids off to school.

MAJOR LIFE EVENTS IN LAST 5 YEARS

9%
Had a child
102 INDEX SCORE

32%
Started a new job / career
126 INDEX SCORE

18%
Bought a new home
133 INDEX SCORE

19%
Moved to a new city
146 INDEX SCORE

9%
Child started school
102 INDEX SCORE

40%
Purchased a car
113 INDEX SCORE

8%
Retired
93 INDEX SCORE

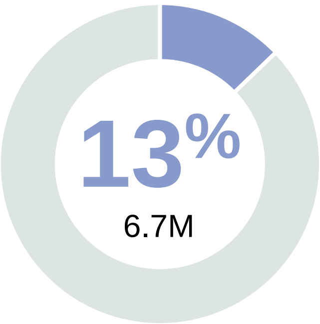
28%
Renovated house
143 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**55%**	82
Savings and investments	**51%**	114
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**45%**	114
Experiences (e.g., concerts, events).	**38%**	90
Personal care and wellness	**30%**	88
Technology and gadgets	**23%**	124

CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



% OF UNITED KINGDOM 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

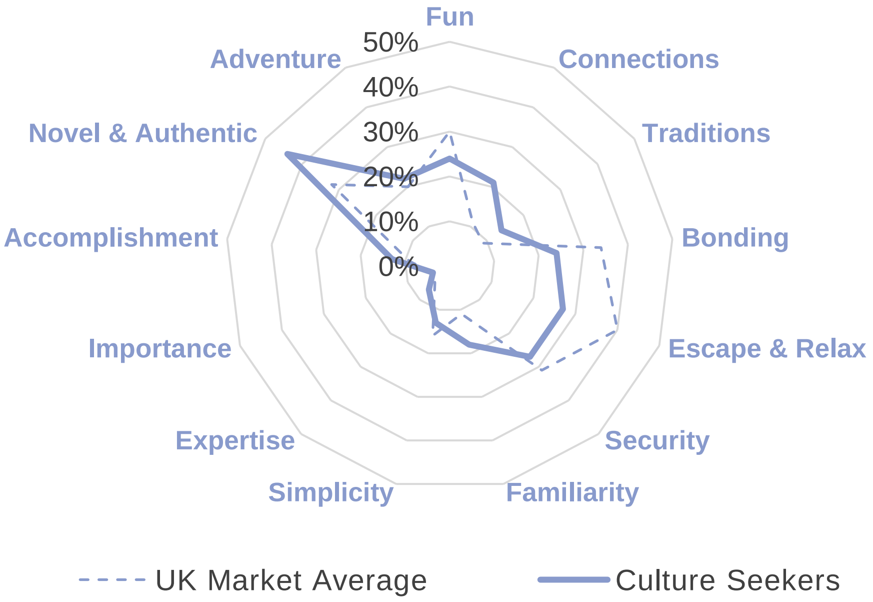
1 We prioritize diversity, inclusion, sustainability and supporting the local economy.

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 something while we are there.

4 Travelling to less explored places and engaging with new cultures provides a sense of accomplishment that we value.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

131

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

105

How is this calculated?

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

CULTURE SEEKERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Trying out local cuisine is a really important part of travel	78%	124
I like to come back from travels having learnt something new	78%	119
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	74%	125
I like to be able to take my time at a historic site or in a museum and not feel rushed	73%	109
When I travel to natural environments it makes me reflect on how fortunate I am	72%	126
I learn the basics of a language before visiting a country / region	66%	131
I'm passionate about travelling	66%	107
I am more likely to select destinations / activities that invest in socially responsible tourism	64%	130
I go where I want to go, no matter the hurdles	51%	115
I'm open to unconventional accommodations when travelling	43%	121
I seek out destinations where I can explore my ancestral heritage	34%	121
Even while travelling, I like to maintain regular contact with my duties or obligations back home	34%	127
I'd be open to using AI-powered chatbots for travel planning and assistance	26%	119

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	40%	127
To open my mind to new perspectives	39%	136
To feel connected with new people	22%	137
To feel like a local	21%	142
To be familiar with my surroundings	16%	116
To feel like I've accomplished something	15%	126

DESIRED DESTINATION

	SCORE	INDEX
Authentic	51%	141
Accepting	32%	146
Unique	28%	127
Sociable	27%	115
Open	27%	150
Free-Spirited	16%	119

CULTURE SEEKERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

AGE

	SCORE	INDEX
18-34	**34%**	113
35-54	**30%**	94
55+	**36%**	95
MEAN YEARS	**46.2**	90

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	**21%**	99
>$40K to $120K	**67%**	108
More than $120K	**9%**	101
Refused	**3%**	79

EMPLOYMENT

	SCORE	INDEX
Employed FT	**51%**	112
Employed PT	**13%**	100
Self-employed	**6%**	119
Retired	**18%**	90

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	80
Secondary education	**21%**	81
Post-secondary education	**79%**	120

80%

118 Have a valid passport

GENDER

53% 114 Male

45% 83 Female

2% 147 Non-binary / Other

HOUSEHOLD

21% 94 Children <18 Living At Home*

7% 71 Children 18+ Living At Home*

22% 93 Children NOT Living At Home*

57% 113 No Children

** Option is not exclusive*

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX
Greater London	**22%**	120
South East	**13%**	96
West Midlands	**11%**	119
North West	**10%**	87
East of England	**10%**	99
Yorkshire and The Humber	**7%**	80

	SCORE	INDEX
Scotland	**7%**	83
South West	**6%**	78
East Midlands	**6%**	95
Wales	**5%**	107
North East	**4%**	86

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

85

TRAVEL TRADE INDEX: **GROUP**

100

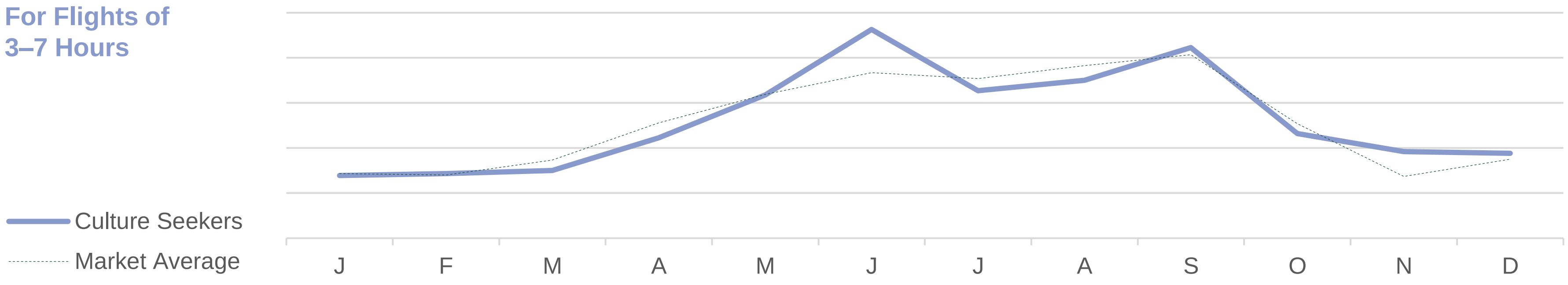
KEY terminology on this page

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

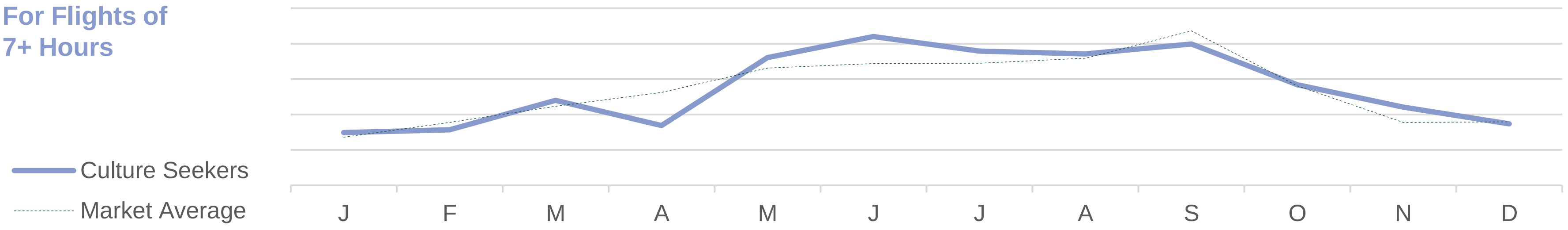
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	41%	127
3-5 Days	26%	113
1 Week Holiday	18%	101
2 Weeks Holiday	15%	126
3 Weeks Or More	9%	135

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	44%	103
International Leisure	30%	112
Business Trip	15%	123
Added Personal To Business	6%	108
Worked During Vacation	10%	127

Incidence is frequency of 2+ times per year

CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**45%**	107
Vacation Rental (e.g., Airbnb, Vrbo)	**21%**	104
Premium Hotel	**21%**	92
Friend's or family's place	**19%**	135
Budget Hotel	**17%**	131
Bed & Breakfast	**15%**	119

THOUGHTS ON INDIGENOUS TRAVEL

66%

131 INDEX SCORE

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

16%

130 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	**79%**	131
I really want to learn about the history of the destinations I visit	**79%**	121
I like to explore places that are off the beaten path and less explored	**69%**	125
I'm willing to put in the effort while travelling in order to see lesser-known places	**66%**	123
I'm open to travelling to destinations with limited tourist infrastructure	**61%**	130
I'm open to visiting destinations with challenging climates or weather conditions	**44%**	121

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**49%**	75
Solo	**23%**	137
Adult relatives	**21%**	79
Kids	**12%**	92
Friends	**12%**	101

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,260

94
INDEX SCORE

SPEND STYLE

Mid-range to Premium

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	**70%**	138
It's important for me to know that the money I spend will support the local economy I'm visiting	**65%**	138
I consider the impact that I personally have on the destinations I visit	**64%**	131
Hearing from underrepresented communities is an important part of travelling	**57%**	135
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**45%**	126

54%

PRIORITIZE SUSTAINABLE TRAVEL

126 INDEX SCORE

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

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

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	**71%**	134
○ Museums	**45%**	134
○ Historical or archeological sites	**42%**	120
○ Visiting local monuments	**41%**	134
Local cuisine	**55%**	109
○ Local restaurants	**47%**	108
○ Cafes or bakeries	**31%**	115
Festivals and events	**41%**	141
○ Music concerts or festivals	**26%**	133
○ Cultural or traditional festivals	**15%**	141
Casual sports	**13%**	119
○ Casual biking	**5%**	118
○ Road cycling	**5%**	126
High-intensity sports	**7%**	110
○ Mountain biking	**3%**	111
○ Bungee jumping or skydiving	**2%**	112
Nature experiences	**34%**	88
Shopping	**30%**	86
Guided tours	**24%**	99
Overnight experiences	**21%**	110
Health and wellness	**17%**	93
Nightlife	**16%**	104
Family-focused attractions	**16%**	85

CULTURE SEEKERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	**57%**	72	**60%**	77
To escape from routine	**32%**	71	**32%**	81
To spend time with family	**35%**	87	**33%**	84
To learn through other cultures	**35%**	140	**42%**	127
For adventure and excitement	**35%**	127	**38%**	115
To have fun with friends	**30%**	123	**26%**	120
To check off dream travel places	**23%**	131	**21%**	89
For a romantic getaway	**13%**	99	**11%**	102
For personal reflection and growth	**13%**	121	**12%**	130

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	**46%**	89	**37%**	84
Visiting friends / family	**33%**	142	**38%**	129
Family / friends wanted to go	**30%**	89	**26%**	92
Festival or event	**26%**	134	**25%**	129
Special event (e.g., wedding, reunion)	**24%**	116	**33%**	129
Kids wanted to go	**18%**	95	**10%**	91

14% 92 INDEX SCORE

Travel aligns with children's school schedule

21% 95 INDEX SCORE

Take time off for vacation during major holidays

16% 124 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 plan within 4-5 months of a trip and use many information resources.

73%

Primary Trip Planner

130

INDEX SCORE

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

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

7 MONTHS +
BEFORE MY TRIP

6 MONTHS
BEFORE MY TRIP

5 MONTHS
BEFORE MY TRIP

4 MONTHS
BEFORE MY TRIP

3 MONTHS
BEFORE MY TRIP

2 MONTHS
BEFORE MY TRIP

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 3.7 months
- Travel review sites
- Travel booking sites / apps

Booked Transportation – 2.9 months
- Direct with company

Booked Accommodation – 2.9 months
- Travel booking sites / apps

Booked Activities – 1.5 months
- Travel booking sites / apps

FLIGHT OF 7+ HOURS

Started Researching and Planning – 5.1 Months
- Travel provider websites
- Travel booking sites / apps

Booked Transportation – 4.0 months
- Direct with company

Booked Accommodation – 3.7 months
- Travel booking sites / apps

Booked Activities – 2.3 months
- Travel booking sites / apps

CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips enjoy the culture, food, music, and shopping of a destination.
- Some couple' trips are more like Simplicity Lovers.

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

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

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

23% 113 INDEX SCORE ● ● ● ● ●

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre	**27%**	
	Cultural experience	**16%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Local restaurants	**39%**	
	Museums	**26%**	
	Historical or archeological sites	**23%**	
KEY BEHAVIOURS	Exploration of safe and trendy destinations, not planned too far in advance		

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

20% 158 INDEX SCORE ● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Alone	**34%**	
	Couple only	**30%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Novel & Authentic
ACTIVITIES	Museums	**39%**	
	Bars and pubs	**30%**	
	Visiting local monuments	**28%**	
KEY BEHAVIOURS	Visiting friends, connecting, trying local restaurants and nightlife		

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

12% 122 INDEX SCORE ● ● ● ● ●

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	**38%**	
	Alone	**33%**	
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Security
ACTIVITIES	Local restaurants	**64%**	
	Visiting local monuments	**46%**	
	Museums	**45%**	
KEY BEHAVIOURS	Authentic experience, immersed in a new culture. Planned well in advance		

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

36% 140 INDEX SCORE ● ● ○ ○ ○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort	**32%**	
	Countryside and village	**24%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Security
ACTIVITIES	Local restaurants	**38%**	
	Outdoor markets	**21%**	
	Nature walks	**19%**	
KEY BEHAVIOURS	Planned in advance, affordable destination, focussed on reliability and ease of travel		

CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek rich culture and heritage, with a variety of museums and historical sites.
- We travel in the UK and Europe, including Spain, France and Italy. We have also visited the USA.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	**28%**	87	Greece	**5%**	82
Spain	**10%**	78	Germany	**3%**	138
France	**8%**	131	Portugal	**3%**	85
USA	**8%**	113	Japan	**2%**	123
Italy	**6%**	119	Thailand	**2%**	121

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**47%**	134
Has a variety of museums and / or historical sites	**40%**	129
Is inclusive and tolerant	**39%**	150
Has many hidden gems	**32%**	127
Provides a variety of local festivals and events	**27%**	149
Has a thriving arts and music scene	**20%**	151
Offers an energetic and dynamic cultural scene	**19%**	145
Offers an eccentric and unique atmosphere	**15%**	135

CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

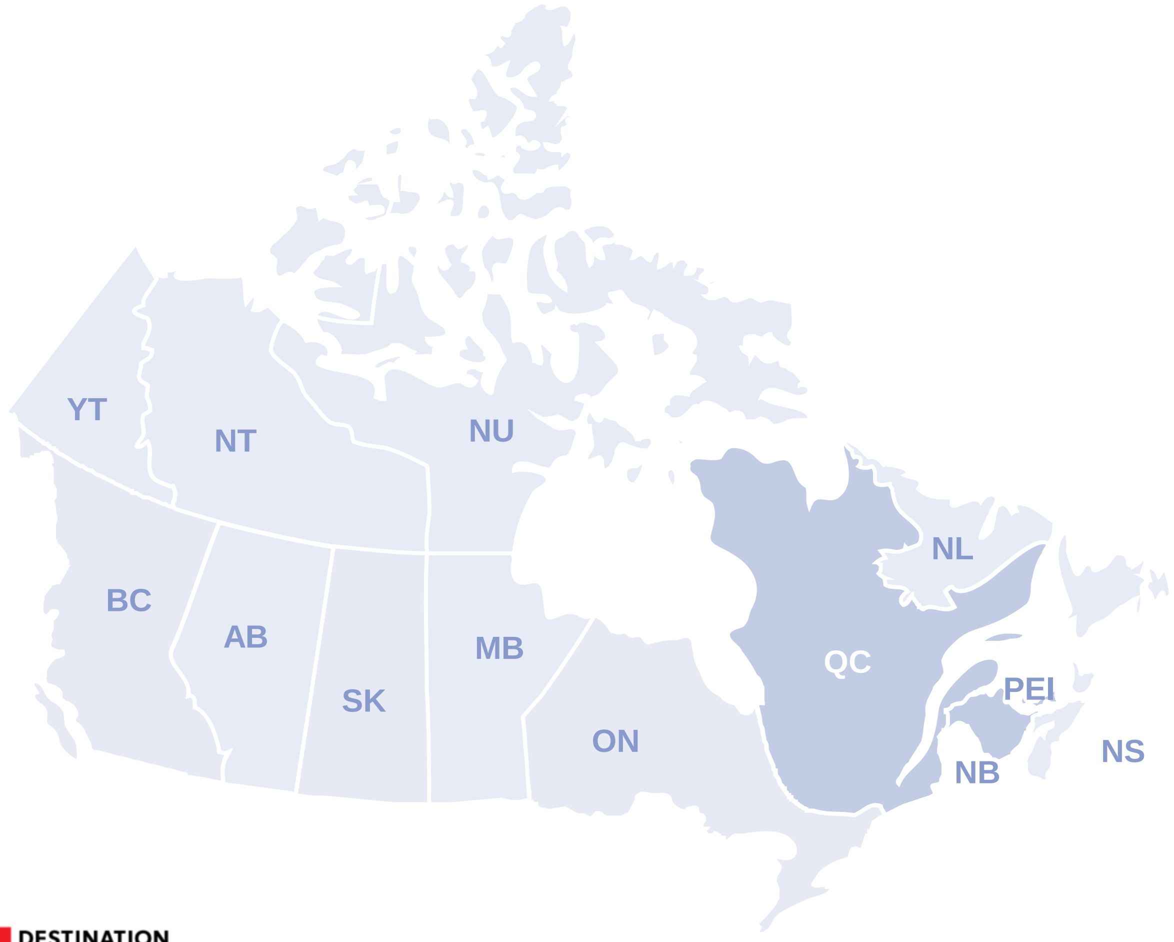
OVERALL INSIGHT

- We have likely visited Canada once or twice, but perhaps not in the past five years.
- We have explored a range of provinces, favouring Ontario, British Columbia and Quebec, but also ventured into the Prairies, Atlantic provinces, and the Territories.
- A future visit could include Toronto or Vancouver.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	16%	72
BC	31%	80
MB	4%	94
NB	8%	116
NL	4%	82
NS	8%	92
NT	6%	109
NU	4%	110
ON	46%	94
PEI	5%	91
QC	28%	117
SK	2%	86
YT	4%	108

CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Most travel to Canada has been done during the spring, summer and fall months.
- A number of us are likely to return to Canada within the next couple of years, especially those who have visited before.
- Overall, our knowledge of Canada as a travel destination has an opportunity to grow.

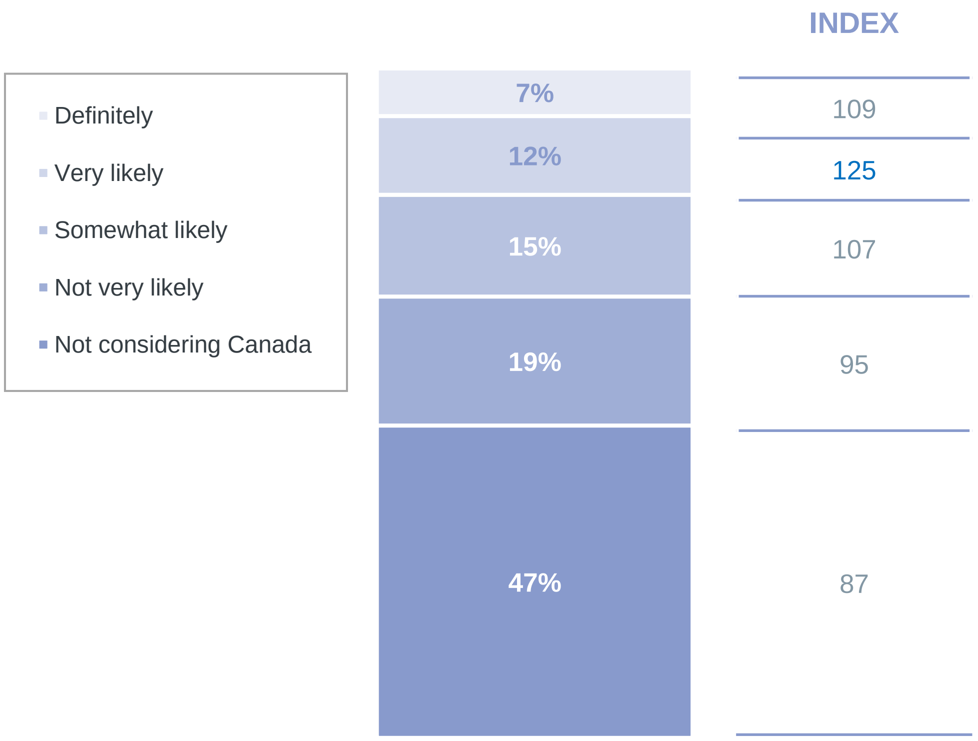
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	**SPRING** (Mar-May)	**SUMMER** (Jun-Aug)	**AUTUMN** (Sept-Nov)
CULTURE SEEKERS	**24%**	**30%**	**43%**	**26%**
VS. TOTAL MARKET	17%	29%	46%	29%

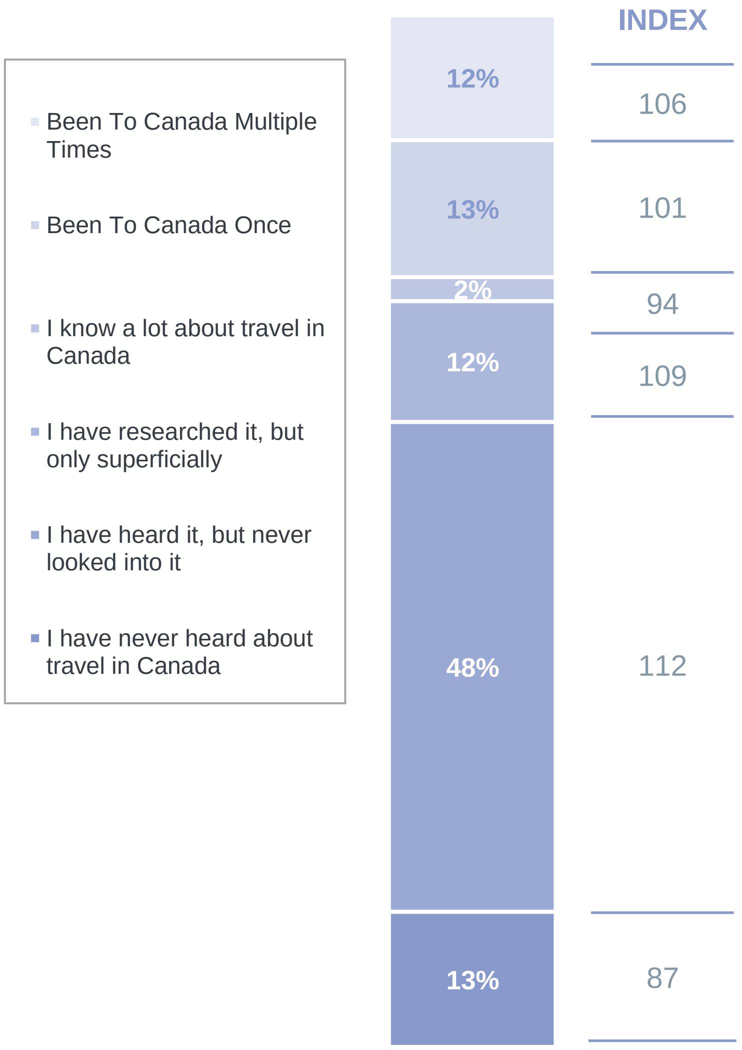
14% Been to Canada in last 5 years

114 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 started a new job, purchased a new car, and some of us have also invested in home renovations or bought a new home.

MAJOR LIFE EVENTS IN LAST 5 YEARS

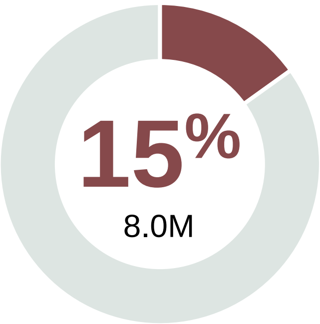
6%	Had a child	95 INDEX SCORE
31%	Started a new job / career	122 INDEX SCORE
12%	Bought a new home	103 INDEX SCORE
12%	Moved to a new city	113 INDEX SCORE
4%	Child started school	93 INDEX SCORE
30%	Purchased a car	78 INDEX SCORE
8%	Retired	94 INDEX SCORE
19%	Renovated house	74 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**57%**	86
Experiences (e.g., concerts, events).	**47%**	121
Savings and investments	**45%**	93
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**44%**	113
Personal care and wellness	**31%**	97
Technology and gadgets	**22%**	118

REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



% OF UNITED KINGDOM POPULATION

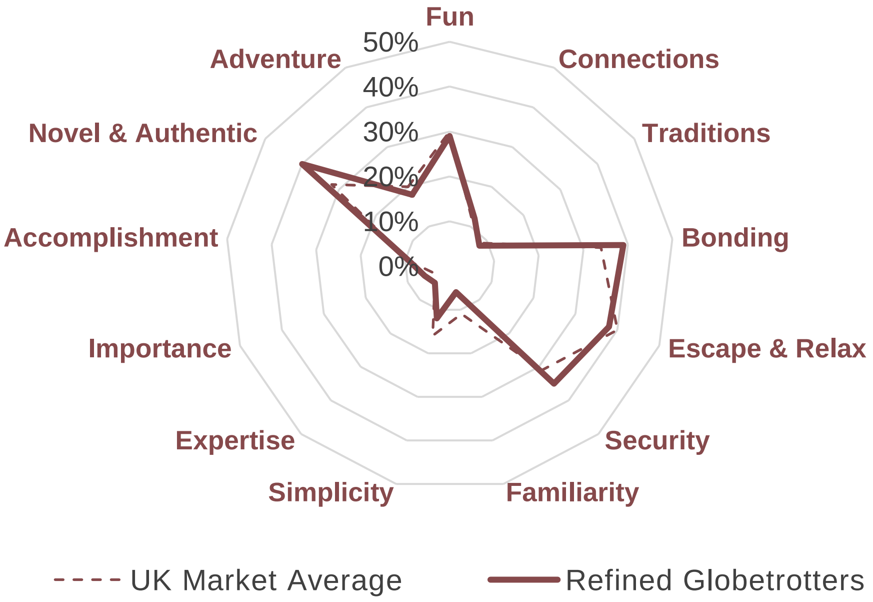
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

We immerse ourselves in history, museums, and the authentic charm of new places, ensuring smooth travel with all-inclusive packages and expert-guided tours.

WHAT YOU NEED TO KNOW ABOUT ME

1	Travel is our #1 spending priority.
2	We have the flexibility to travel at any time of year, as our kids are grown up.
3	We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.
4	We may be lapsed visitors to Canada, so need to learn about the culture, experiences, and luxury we haven't seen yet.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

103

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

136

How is this calculated?

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

REFINED GLOBETROTTERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm always on the look out for new destinations to visit next	83%	128
I like to come back from travels having learnt something new	79%	122
I'm passionate about travelling	78%	126
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	75%	126
I tend to not think about my budget too much when travelling	67%	146
While I think about value for money, it doesn't tend to influence my choice of destination	66%	134
Luxury experiences are an important part of travel	64%	149
I generally don't participate in physical activities during my holidays	59%	113
I make sure to visit the "famous" sites wherever I go	58%	129
I enjoy joining guided tours to explore new destinations	41%	130
When traveling, I expect 24 / 7 support from a travel provider	37%	134
I seek travel advice from travel agencies and agents	36%	137
I seek out fine dining experiences and gourmet cuisine when I travel	34%	127

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	57%	134
To feel safe and secure	42%	109
To have authentic experiences	38%	122
To bond through shared experiences	30%	123
To open my mind to new perspectives	26%	110
To be proud to share my travel experiences	20%	106

DESIRED DESTINATION

	SCORE	INDEX
Authentic	40%	116
Luxurious	37%	152
Charming	27%	117
Exclusive	25%	151
Unique	20%	107
World-Class	17%	142

REFINED GLOBETROTTERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

AGE

	SCORE	INDEX
18-34	**22%**	90
35-54	**30%**	93
55+	**49%**	111
MEAN YEARS	**52.0**	111

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	**10%**	53
>$40K to $120K	**70%**	131
More than $120K	**16%**	147
Refused	**4%**	107

EMPLOYMENT

	SCORE	INDEX
Employed FT	**50%**	109
Employed PT	**11%**	91
Self-employed	**4%**	99
Retired	**27%**	104

EDUCATION

	SCORE	INDEX
Primary education or less	**1%**	140
Secondary education	**23%**	87
Post-secondary education	**77%**	112

87%

134 Have a valid passport

GENDER

51%	107	Male
49%	92	Female
1%	113	Non-binary / Other

HOUSEHOLD

22%	95	Children <18 Living At Home*
14%	125	Children 18+ Living At Home*
34%	113	Children NOT Living At Home*
44%	99	No Children

** Option is not exclusive*

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX
Greater London	**17%**	102
South East	**15%**	124
North West	**11%**	99
Scotland	**10%**	139
South West	**9%**	109
Yorkshire and The Humber	**8%**	91

	SCORE	INDEX
West Midlands	**8%**	58
East of England	**7%**	69
East Midlands	**7%**	101
Wales	**5%**	93
North East	**5%**	102

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

140

TRAVEL TRADE INDEX: **GROUP**

114

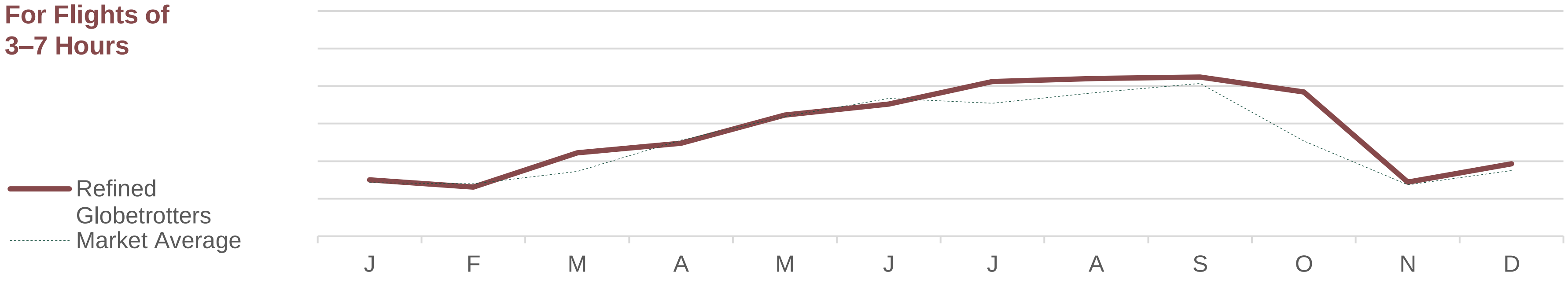
KEY terminology on this page

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

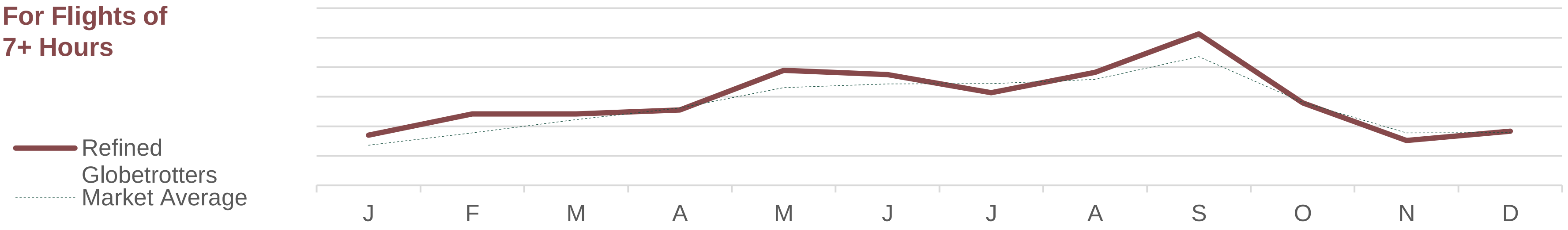
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	40%	120
3-5 Days	27%	120
1 Week Holiday	22%	124
2 Weeks Holiday	14%	121
3 Weeks Or More	6%	109

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	43%	99
International Leisure	39%	134
Business Trip	14%	117
Added Personal To Business	5%	106
Worked During Vacation	6%	104

Incidence is frequency of 2+ times per year

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Premium Hotel	**40%**	147
Mid-priced Hotel	**34%**	62
All-inclusive resort	**25%**	134
Cruise ship	**16%**	150
Vacation Rental (e.g., Airbnb, Vrbo)	**15%**	51
High-end / Luxury Hotel	**12%**	148

THOUGHTS ON INDIGENOUS TRAVEL

57%

114 INDEX SCORE

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

11%

105 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	**79%**	120
You only ever get to know a country by experiencing its culture	**76%**	116
I'm willing to put in the effort while travelling in order to see lesser-known places	**57%**	109
I like to explore places that are off the beaten path and less explored	**48%**	94
I'm open to travelling to destinations with limited tourist infrastructure	**38%**	88
I'm open to visiting destinations with challenging climates or weather conditions	**31%**	99

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**67%**	111
Adult relatives	**24%**	105
Kids	**15%**	95
Friends	**11%**	98
Solo	**8%**	84

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,490

129
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	**51%**	95
I consider the impact that I personally have on the destinations I visit	**45%**	98
It's important to me that I visit somewhere that is open to diversity and inclusion	**45%**	98
Hearing from underrepresented communities is an important part of travelling	**37%**	103
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**27%**	92

35%

PRIORITIZE SUSTAINABLE TRAVEL

95 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	**67%**	125
○ Historical or archeological sites	**44%**	127
○ Museums	**42%**	124
○ Visiting local monuments	**40%**	129
Local cuisine	**64%**	127
○ Local restaurants	**55%**	125
○ Luxury dining	**26%**	146
Guided tours	**37%**	138
○ City tours	**29%**	137
○ Boat tours	**18%**	150
Overnight experiences	**27%**	135
○ Cruise	**16%**	148
○ Staying at all-inclusive resort	**10%**	133
Health and wellness	**22%**	140
○ Spas	**16%**	131
○ Sauna or steam bath	**13%**	143
Shopping	**41%**	109
Nature experiences	**37%**	95
Family-focused attractions	**23%**	92
Festivals and events	**17%**	84
Nightlife	**11%**	91
Water-based sports	**10%**	94
Casual sports	**8%**	76

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	**77%**	113	**74%**	120
To escape from routine	**47%**	98	**38%**	92
To spend time with family	**46%**	101	**47%**	105
To learn through other cultures	**23%**	106	**30%**	105
To check off dream travel places	**17%**	103	**26%**	108
To have fun with friends	**16%**	88	**17%**	94
For adventure and excitement	**20%**	86	**21%**	77
To be pampered	**16%**	140	**10%**	114
To have memories from top travel spots	**8%**	95	**13%**	100

EXTERNAL TRIP TRIGGERS

	SCORE	**INDEX**	**SCORE**	**INDEX**
Partner / spouse wanted to go	**55%**	106	**52%**	110
Family / friends wanted to go	**34%**	106	**25%**	89
Visiting friends / family	**21%**	95	**27%**	92
Special event (e.g., wedding, reunion)	**19%**	101	**19%**	97
Festival or event	**11%**	88	**16%**	95
Kids wanted to go	**18%**	95	**14%**	95

19% 97 INDEX SCORE

Travel aligns with children's school schedule

23% 97 INDEX SCORE

Take time off for vacation during major holidays

11% 92 INDEX SCORE

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

REFINED GLOBETROTTERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We are average planners - no need to wait to the last minute but no need to plan too far ahead.

61%

Primary Trip Planner

101
INDEX SCORE

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

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

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 4.7 months
- Travel review sites
- Recommendations from friends or family

Booked Accommodation – 4.0 months
- Travel booking sites / apps

Booked Transportation – 3.8 months
- Direct with company

Booked Activities – 2.2 months
- Travel booking sites / apps

FLIGHT OF 7+ HOURS

Started Researching and Planning – 6.5 Months
- Travel booking sites / apps
- Travel provider websites

Booked Transportation – 5.0 months
- Direct with company

Booked Accommodation – 4.6 months
- Travel booking sites / apps

Booked Activities – 2.8 months
- Direct with company

7 MONTHS +
BEFORE MY TRIP

6 MONTHS
BEFORE MY TRIP

5 MONTHS
BEFORE MY TRIP

4 MONTHS
BEFORE MY TRIP

3 MONTHS
BEFORE MY TRIP

2 MONTHS
BEFORE MY TRIP

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips explore culture in small towns and can seek luxury.
- We also take trips like Simplicity Lovers 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

48% 147 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort	21%	
	Small cities and town	17%	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants	47%	
	Visiting local monuments	29%	
	Outdoor markets	19%	
KEY BEHAVIOURS	Mid-range budget, most likely to be a cruise		

% OF TOTAL TRIPS

9% 111 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Luxury Resort		
COMPANIONS	Couple only	50%	
	Extended family	30%	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Security
ACTIVITIES	Local restaurants	32%	
	Oceanside beaches	16%	
	Souvenir shopping	6%	
KEY BEHAVIOURS	Upscale all-inclusive escape with extended family		

% OF TOTAL TRIPS

23% 165 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only	51%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Security
ACTIVITIES	Local restaurants	50%	
	Souvenir shopping	24%	
	Oceanside beaches	17%	
KEY BEHAVIOURS	Reliable couples trip to a familiar beach destination		

% OF TOTAL TRIPS

12% 122 INDEX SCORE

SEGMENT ALIGNMENT

● ● ○ ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Extended family	25%	
	Non-family only	15%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Adventure
ACTIVITIES	Local restaurants	42%	
	Museums	41%	
	Bars and pubs	38%	
KEY BEHAVIOURS	Visiting friends, exploring the bustle of a city and enjoying nightlife		

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We enjoy exploring well-known and developed destinations, with access to nature, through curated experiences.
- We travel everywhere, with a skew towards Europe, North America, South America, and tropical destinations.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	**25%**	80	France	**6%**	94
Spain	**14%**	105	Portugal	**4%**	119
USA	**105**	114	Germany	**2%**	103
Italy	**8%**	136	Barbados	**2%**	151
Greece	**114**	123	Japan	**2%**	113

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**40%**	120
Has a variety of museums and / or historical sites	**38%**	124
Renowned for food and drink experiences	**37%**	137
Has famous attractions	**32%**	133
Has luxury dining, shopping, and accommodations	**28%**	148
Provide access to unique natural wonders	**26%**	114
Provides opportunities to view wildlife in its natural habitat	**24%**	113
Offers all-inclusive resort packages	**23%**	138

REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

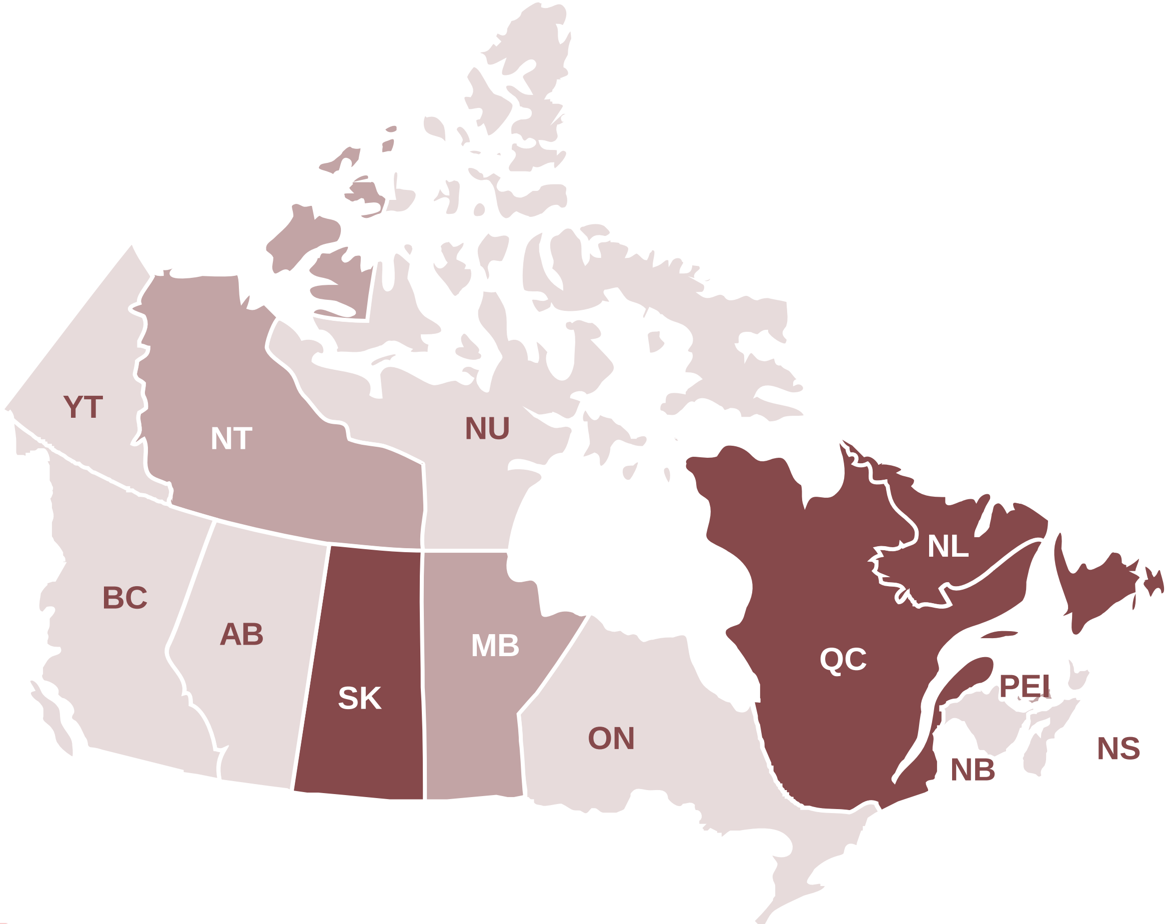
OVERALL INSIGHT

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

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	22%	98
BC	41%	114
MB	7%	117
NB	6%	102
NL	10%	127
NS	13%	111
NT	7%	121
NU	2%	90
ON	50%	114
PEI	8%	120
QC	29%	127
SK	9%	133
YT	4%	111

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

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

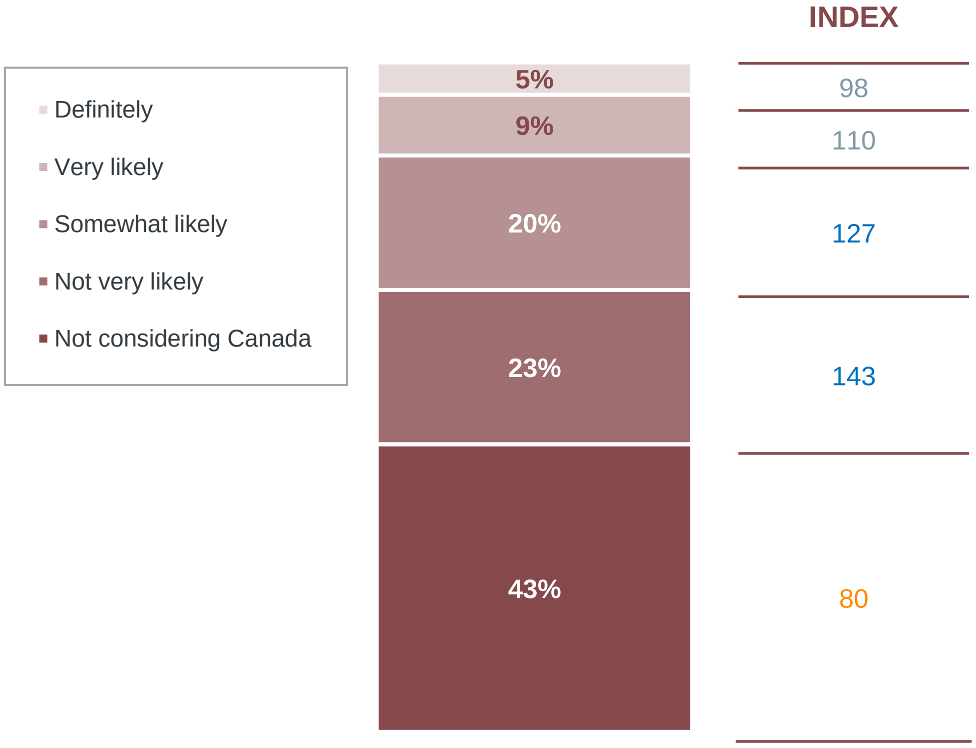
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	**10%**	**30%**	**45%**	**36%**
VS. TOTAL MARKET	17%	29%	46%	29%

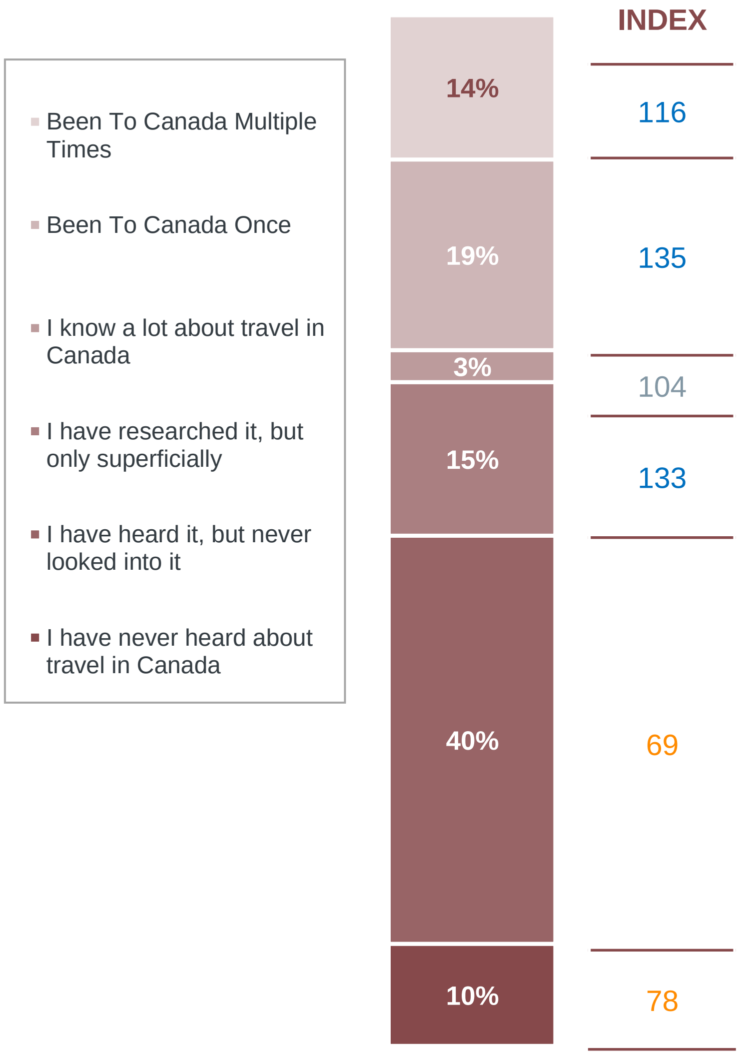
16% Been to Canada in last 5 years

118 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Our higher net worth affords us the ability to continue to invest in new, big purchases (like home renovations or vehicles) - and of course travel.
- We are happy where we are, not moving cities or houses.

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%
Had a child
96 INDEX SCORE

23%
Started a new job / career
96 INDEX SCORE

10%
Bought a new home
91 INDEX SCORE

7%
Moved to a new city
87 INDEX SCORE

6%
Child started school
97 INDEX SCORE

46%
Purchased a car
131 INDEX SCORE

10%
Retired
103 INDEX SCORE

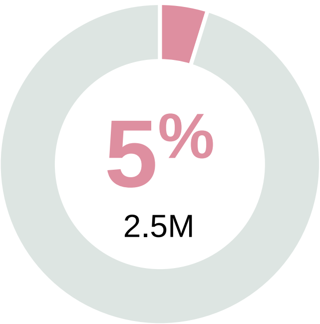
25%
Renovated house
119 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**77%**	146
Savings and investments	**48%**	104
Experiences (e.g., concerts, events).	**41%**	98
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**35%**	66
Personal care and wellness	**27%**	61
Fashion and accessories	**26%**	116

PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF UNITED KINGDOM POPULATION

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

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

WHAT YOU NEED TO KNOW ABOUT ME

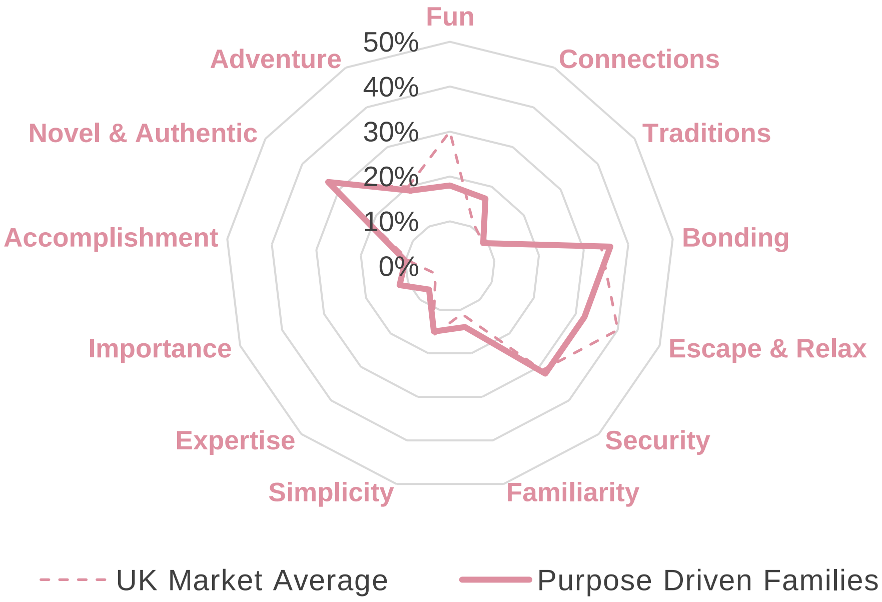
1 We take pride in our destination choices, and the effort it takes to reach some destinations.

2 Being trendy for us includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.

3 We value being able to provide these experiences to our children, but we also appreciate how it allows us to demonstrate our success to others.

4 We value and use the expertise of travel agents to ensure we are getting the best experiences.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

132

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

116

How is this calculated?

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

PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We value learning, engaging with local cultures, and exploring the history of our destinations.
- We use travel to bond and create memories, and we'll tackle a few challenges to achieve that.
- We are in pursuit of unique destinations that will make our friends say 'wow' when we share photos and stories.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	**85%**	127
I like to come back from travels having learnt something new	**77%**	118
I learn the basics of a language before visiting a country / region	**65%**	129
Videos and pictures on social media inspire me to travel	**53%**	136
I love posting my trips on social media to share with friends	**49%**	125
I feel best on vacation when being highly active	**43%**	128
I enjoy joining guided tours to explore new destinations	**42%**	134
When there's a lot of positive buzz about a destination it makes me want to visit it more	**42%**	134
I seek out destinations where I can explore my ancestral heritage	**39%**	134
I seek out fine dining experiences and gourmet cuisine when I travel	**37%**	134
When traveling, I expect 24 / 7 support from a travel provider	**37%**	137
I seek travel advice from travel agencies and agents	**34%**	131
I'd be open to using AI-powered chatbots for travel planning and assistance	**31%**	132

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	**33%**	112
To feel welcomed	**30%**	125
To feel connected with new people	**17%**	119
To be familiar with my surroundings	**16%**	114
To feel like I'm important	**12%**	149
To push my limits and challenge myself	**8%**	108

DESIRED DESTINATION

	SCORE	INDEX
Caring	**26%**	153
Unique	**24%**	117
Accepting	**24%**	115
Adventurous	**23%**	108
Free-Spirited	**18%**	131
Passionate	**15%**	123

PURPOSE DRIVEN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are parents under 45 years of age, with kids of all ages .
- We attended post-secondary education, are working full-time, and earn comfortable to high incomes.

73%
103 Have a valid passport

GENDER

54%	117	Male
46%	85	Female
0%	83	Non-binary / Other

HOUSEHOLD

87%	143	Children <18 Living At Home*
9%	87	Children 18+ Living At Home*
6%	65	Children NOT Living At Home*
7%	59	No Children

** Option is not exclusive*

AGE

	SCORE	INDEX
18-34	44%	132
35-54	47%	128
55+	9%	63
MEAN YEARS	39.3	66

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	17%	85
>$40K to $120K	69%	122
More than $120K	11%	115
Refused	3%	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	62%	136
Employed PT	18%	124
Self-employed	6%	117
Retired	3%	64

EDUCATION

	SCORE	INDEX
Primary education or less	0%	80
Secondary education	17%	69
Post-secondary education	83%	132

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX
Greater London	28%	141
South East	11%	77
Yorkshire and The Humber	11%	127
West Midlands	9%	81
North West	8%	59
East of England	8%	80

	SCORE	INDEX
Scotland	8%	93
South West	7%	84
East Midlands	6%	94
Wales	5%	83
North East	1%	44

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

130

TRAVEL TRADE INDEX: **GROUP**

132

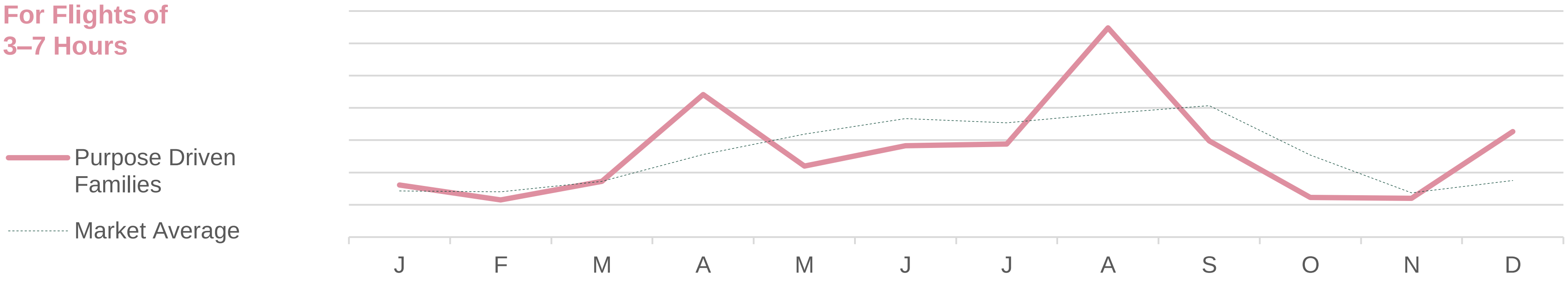
KEY terminology on this page

- **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

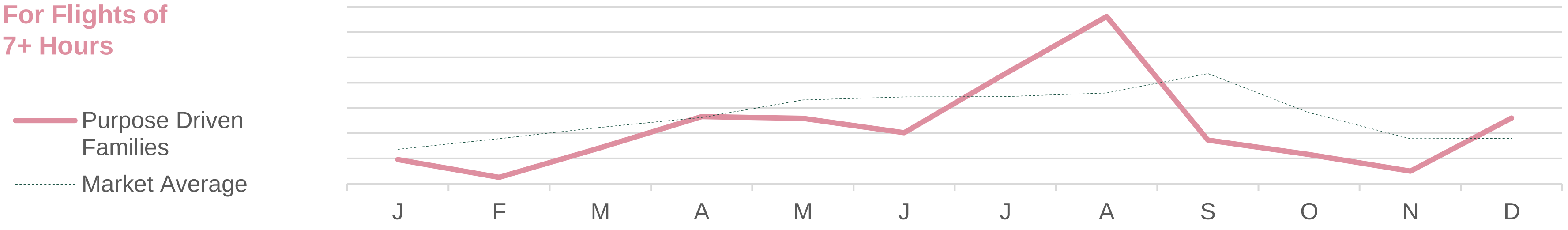
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	38%	109
3-5 Days	23%	102
1 Week Holiday	20%	112
2 Weeks Holiday	9%	93
3 Weeks Or More	7%	114

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	42%	81
International Leisure	16%	77
Business Trip	17%	130
Added Personal To Business	12%	147
Worked During Vacation	9%	123

Incidence is frequency of 2+ times per year

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**40%**	86
Premium Hotel	**27%**	109
Vacation Rental (e.g., Airbnb, Vrbo)	**20%**	93
All-inclusive resort	**19%**	105
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**17%**	146
Friend's or family's place	**15%**	92

THOUGHTS ON INDIGENOUS TRAVEL

60%

120 INDEX SCORE

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

12%

111 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	**82%**	126
You only ever get to know a country by experiencing its culture	**77%**	121
I like to explore places that are off the beaten path and less explored	**56%**	106
I'm willing to put in the effort while travelling in order to see lesser-known places	**54%**	103
I'm open to travelling to destinations with limited tourist infrastructure	**46%**	102
I'm open to visiting destinations with challenging climates or weather conditions	**38%**	111

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel primarily as a nuclear family.
- Our budgets are generous, as we are seeking a premium experience.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**78%**	131
Kids	**65%**	138
Adult relatives	**19%**	66
Solo	**7%**	80
Friends	**3%**	61

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,530

130
INDEX SCORE

SPEND STYLE

Premium to High-end Luxury

$ $ $

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	**67%**	133
I consider the impact that I personally have on the destinations I visit	**66%**	134
It's important for me to know that the money I spend will support the local economy I'm visiting	**57%**	114
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**53%**	141
Hearing from underrepresented communities is an important part of travelling	**50%**	124

62%

PRIORITIZE SUSTAINABLE TRAVEL

140 INDEX SCORE

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

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

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We like to try the top sports in our destinations, from surfing to snowmobiling to fishing.
- Cultural experiences, festivals, and events are also a highlight.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	53%	124
○ Zoos or aquariums	38%	124
○ Amusement parks or theme parks	38%	124
○ Space or science centres	18%	131
Water-based sports	18%	125
○ Swimming	14%	135
○ Surfing	10%	155
Winter-based sports	17%	141
○ Ice skating or hockey	9%	157
○ Snowmobiling	8%	157
Casual sports	14%	127
○ Casual biking	7%	143
○ Fishing	6%	157
High-intensity sports	11%	129
○ Bungee jumping or skydiving	4%	145
○ Whitewater rafting	3%	130
Cultural experiences or attractions	53%	91
Local cuisine	40%	81
Nature experiences	40%	102
Shopping	39%	105
Festivals and events	23%	100
Overnight experiences	19%	103
Health and wellness	16%	89

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	**70%**	97	**64%**	91
To spend time with family	**52%**	108	**66%**	135
To escape from routine	**35%**	78	**45%**	109
For adventure and excitement	**31%**	115	**26%**	88
To have fun with friends	**16%**	89	**4%**	61
To learn through other cultures	**18%**	92	**15%**	76
To check off dream travel places	**12%**	75	**14%**	64
To have memories from top travel spots	**9%**	96	**15%**	105
For personal reflection and growth	**15%**	128	**9%**	111

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	**55%**	134	**66%**	146
Partner / spouse wanted to go	**75%**	145	**57%**	118
Family / friends wanted to go	**37%**	115	**41%**	135
Visiting friends / family	**27%**	118	**41%**	139
Special event (e.g., wedding, reunion)	**32%**	143	**38%**	139
Festival or event	**21%**	119	**16%**	97

61% 140 INDEX SCORE

Travel aligns with children’s school schedule

48% 146 INDEX SCORE

Take time off for vacation during major holidays

17% 130 INDEX SCORE

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

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

71%

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**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 6.0 Months** ○ Social media ○ Recommendations from friends or family
	5 MONTHS BEFORE MY TRIP	**Booked Transportation – 4.1 months** ○ Travel booking sites / apps **Booked Accommodation – 3.8 months** ○ Travel booking sites / apps
Started Researching and Planning – 3.3 months ○ Travel review sites **Booked Accommodation – 2.3 months** ○ Travel booking sites / apps **Booked Transportation – 2.3 months** ○ Direct with company	**4 MONTHS** BEFORE MY TRIP	
	3 MONTHS BEFORE MY TRIP	**Booked Activities – 2.3 months** ○ Travel booking sites / apps
Booked Activities – 1.5 months ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

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

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

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

% OF TOTAL TRIPS

13% 125 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Nuclear family with kids	**64%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Outdoor markets	**35%**	
	Local restaurants	**29%**	
	Museums	**21%**	
KEY BEHAVIOURS	Closer to home, a quick getaway, may stay in a vacation rental		

% OF TOTAL TRIPS

10% 112 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Luxury Resort		
COMPANIONS	Nuclear family with kids	**63%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Security	Bonding
ACTIVITIES	Luxury shopping	**76%**	
	Visiting famous shopping centres	**56%**	
	Nature walks	**47%**	
KEY BEHAVIOURS	Unique and premium, a safe and reliable place for a family vacation		

% OF TOTAL TRIPS

23% 167 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids	**56%**	
	Extended family	**35%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Souvenir shopping	**40%**	
	Local restaurants	**33%**	
	Amusement parks or theme parks	**30%**	
KEY BEHAVIOURS	Focussed on fun, planned well in advance, all for the kids		

% OF TOTAL TRIPS

11% 118 INDEX SCORE

SEGMENT ALIGNMENT

● ● ○ ○ ○

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only	**38%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Novel & Authentic	Fun
ACTIVITIES	Visiting local monuments	**51%**	
	Historical or archeological sites	**47%**	
	Local restaurants	**35%**	
KEY BEHAVIOURS	Can include extended family, focussed on bucket-list experience / destination		

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

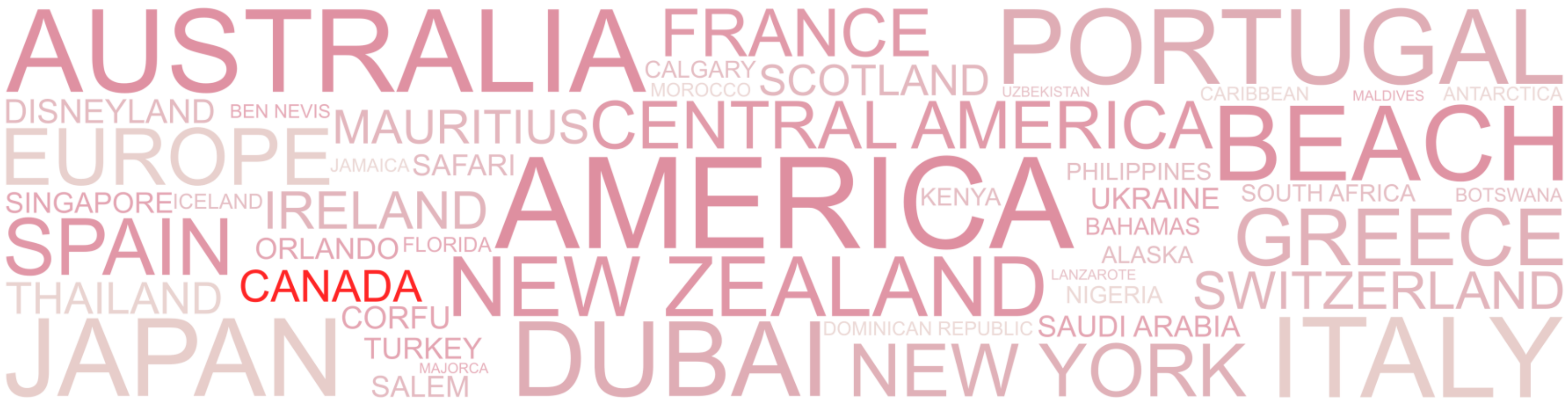
OVERALL INSIGHT

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

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	**27%**	85	Italy	**4%**	93
Spain	**12%**	90	India	**2%**	148
France	**9%**	142	Denmark	**2%**	155
USA	**6%**	91	Austria	**2%**	124
Greece	**5%**	74	Mexico	**2%**	157

WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	**83%**	145
Is inclusive and tolerant	**27%**	117
Offers natural landscapes in close proximity to city amenities	**27%**	126
Provide access to unique natural wonders	**23%**	107
Offers an energetic and dynamic cultural scene	**10%**	111
Provides a remote, no-frills experience	**10%**	115
Is a trendy destination	**7%**	109
Offers options for adrenaline seekers	**5%**	108

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

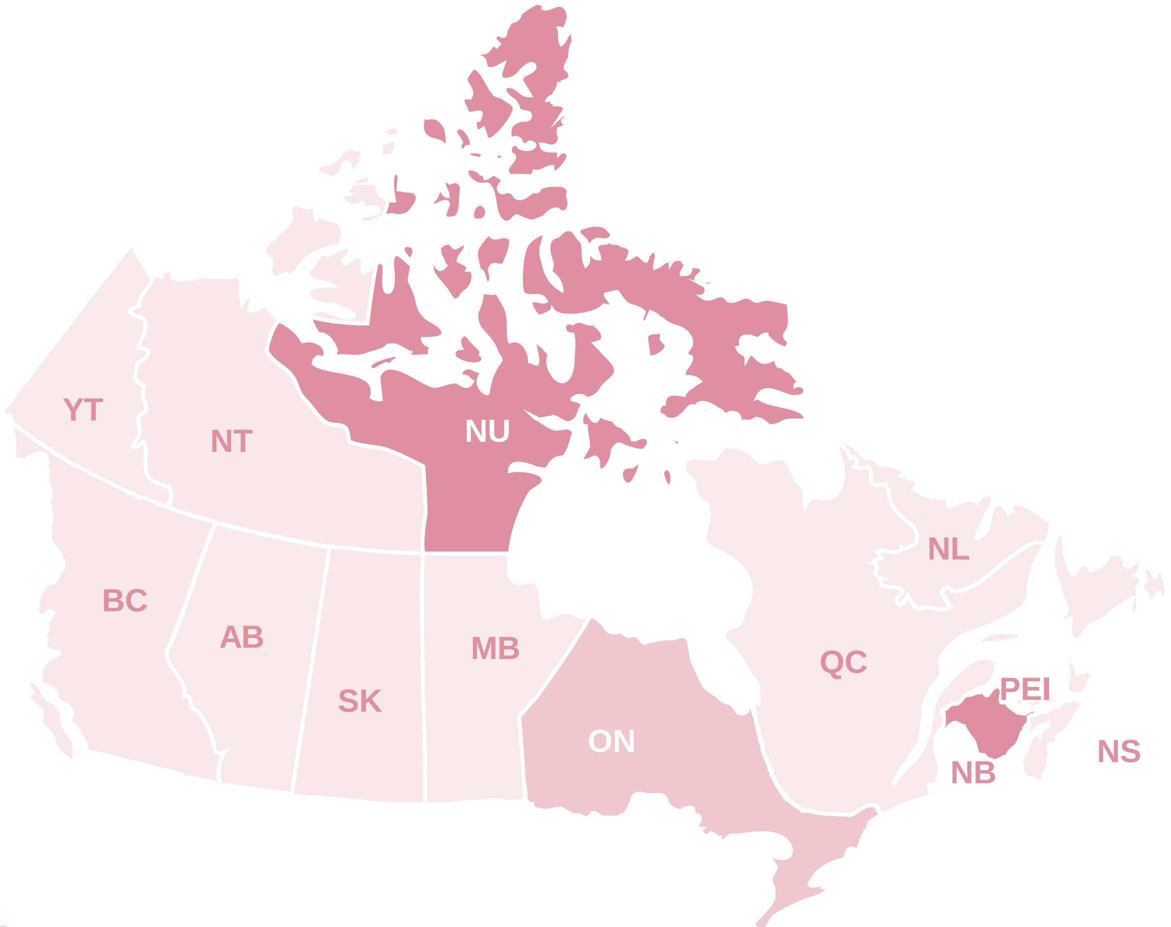
OVERALL INSIGHT

- Our top destinations in Canada so far are Ontario, Quebec and Atlantic provinces.
- Toronto, Montreal, and Ottawa are top of the list to visit in Canada.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	24%	110
BC	24%	53
MB	0%	68
NB	11%	131
NL	7%	106
NS	7%	85
NT	4%	88
NU	8%	153
ON	51%	115
PEI	4%	79
QC	27%	107
SK	0%	68
YT	4%	108

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Those of us who have visited are repeat visitors. We travel in all months, especially during winter holiday.
- If we haven't been yet, we would like to in the next few years.
- We have good familiarity with Canada.

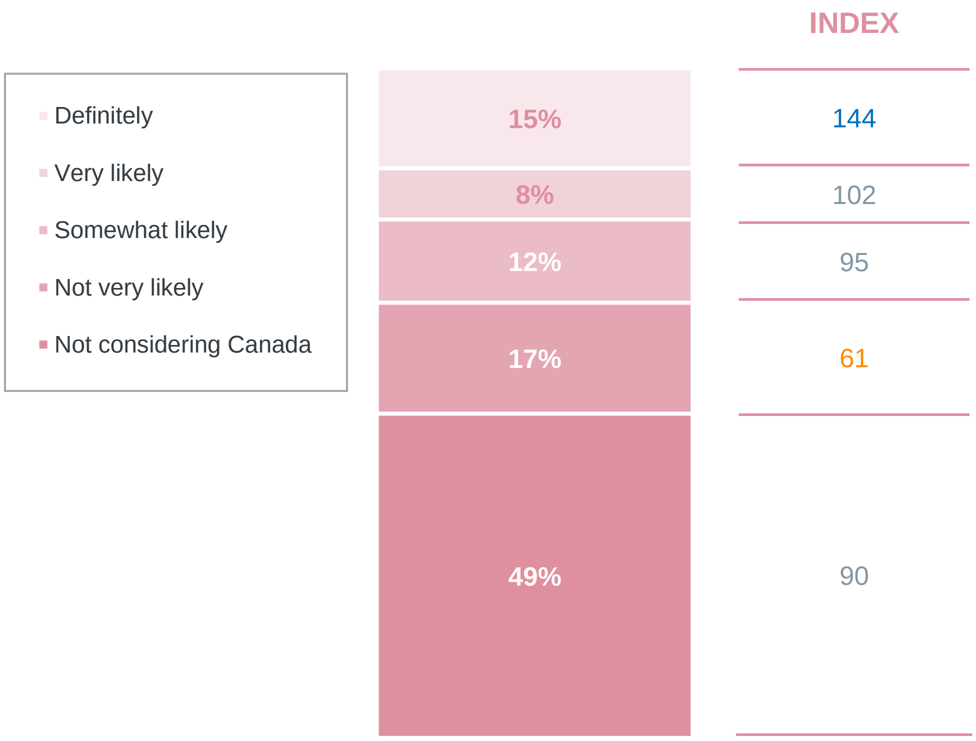
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	**34%**	**28%**	**37%**	**13%**
VS. TOTAL MARKET	17%	29%	46%	29%

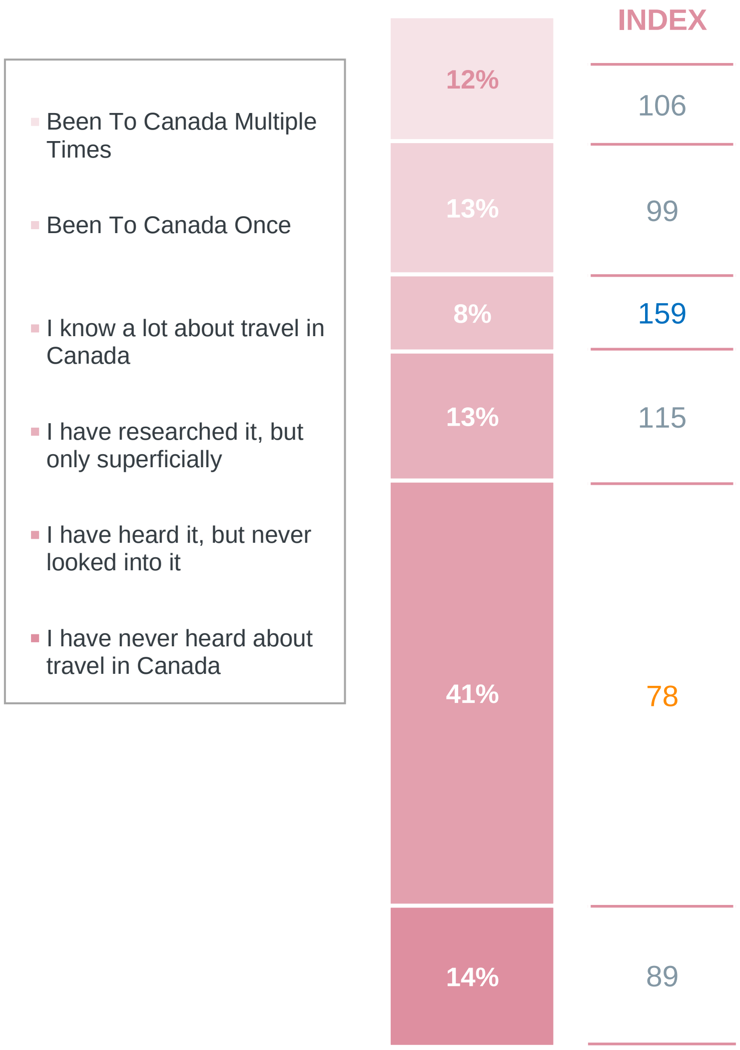
16% Been to Canada in last 5 years

121 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

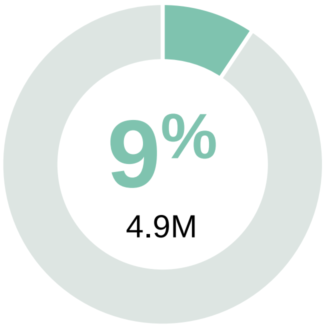
26% Had a child 140 INDEX SCORE	**26%** Started a new job / career 106 INDEX SCORE	**21%** Bought a new home 146 INDEX SCORE	**11%** Moved to a new city 108 INDEX SCORE
33% Child started school 148 INDEX SCORE	**48%** Purchased a car 139 INDEX SCORE	**1%** Retired 61 INDEX SCORE	**24%** Renovated house 114 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**57%**	85
Savings and investments	**46%**	96
Experiences (e.g., concerts, events).	**36%**	81
Personal care and wellness	**34%**	124
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**33%**	57
Home and decor	**29%**	117

CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



% OF UNITED KINGDOM 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

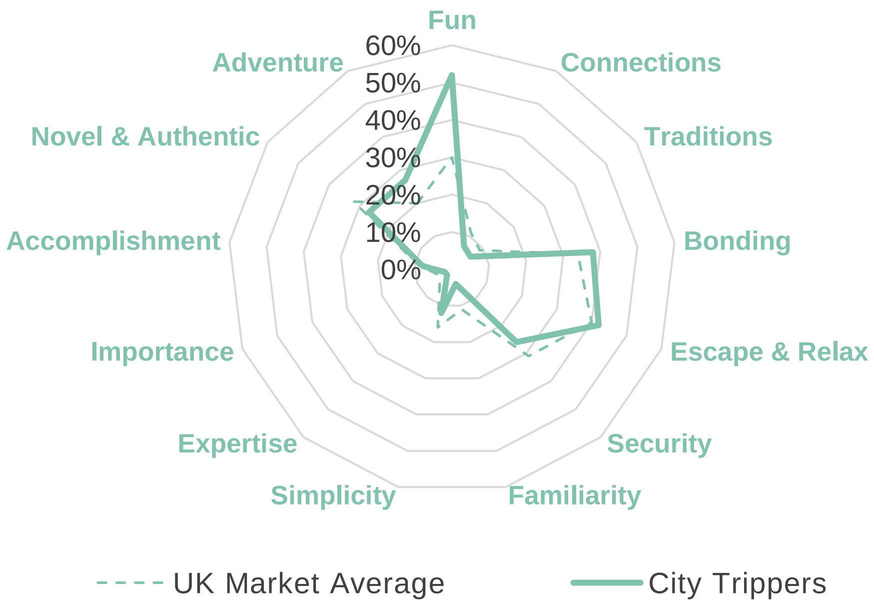
1 We prioritize fun and social settings and seek experiences that are worth sharing on social media.

2 Our travels are about collecting personal experiences, not luxury or education.

3 We like the freedom to explore without an agenda, and disconnect from everyday life.

4 Easy access to trendy hotspots is important, as we like to see and do as much as possible. If a destination garners a lot of positive buzz, it heightens our desire to visit.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

85

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

87

How is this calculated?

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

CITY TRIPPERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	**90%**	147
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	**79%**	118
I enjoy the freedom of exploring new destinations without guided tours	**76%**	125
I prefer destinations with well-established tourist infrastructure	**66%**	120
I generally don't think much on the impact that I personally have on the destinations I visit	**66%**	122
I generally stick to the most popular areas when I visit somewhere	**63%**	121
I make sure to visit the "famous" sites wherever I go	**58%**	131
I like natural attractions but I don't usually think they are the highlights of my trip	**56%**	119
I love posting my trips on social media to share with friends	**50%**	126
Videos and pictures on social media inspire me to travel	**49%**	129
I'm more interested in the present and don't focus much on the history of where I visit	**45%**	128
When there's a lot of positive buzz about a destination it makes me want to visit it more	**43%**	138
I enjoy the beauty of nature without reflecting too much on its significance	**43%**	144

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	**70%**	132
To have a fun, social setting	**49%**	151
To indulge myself and live in the moment	**46%**	147
To let loose and forget about day-to-day life	**33%**	117
To feel a sense of adventure	**29%**	112
To be proud to share my travel experiences	**25%**	124

DESIRED DESTINATION

	SCORE	INDEX
Fun	**71%**	148
Friendly	**66%**	114
Sociable	**34%**	144
Charming	**26%**	115
Accepting	**23%**	112
Trendy	**11%**	142

CITY TRIPPERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

AGE

	SCORE	INDEX
18-34	**39%**	122
35-54	**31%**	96
55+	**31%**	89
MEAN YEARS	**43.6**	81

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	**27%**	128
>$40K to $120K	**63%**	68
More than $120K	**6%**	75
Refused	**5%**	124

EMPLOYMENT

	SCORE	INDEX
Employed FT	**45%**	98
Employed PT	**16%**	116
Self-employed	**4%**	93
Retired	**16%**	85

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	80
Secondary education	**33%**	117
Post-secondary education	**67%**	84

68%

92 Have a valid passport

GENDER

42% 82 Male

58% 118 Female

0% 83 Non-binary / Other

HOUSEHOLD

22% 95 Children <18 Living At Home*

10% 91 Children 18+ Living At Home*

18% 86 Children NOT Living At Home*

60% 117 No Children

** Option is not exclusive*

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX
Greater London	**15%**	97
North West	**13%**	135
West Midlands	**11%**	133
Yorkshire and The Humber	**10%**	122
East of England	**10%**	107
South East	**9%**	50

	SCORE	INDEX
South West	**9%**	107
Scotland	**9%**	109
Wales	**5%**	113
East Midlands	**4%**	77
North East	**4%**	88

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

74

TRAVEL TRADE INDEX: **GROUP**

89

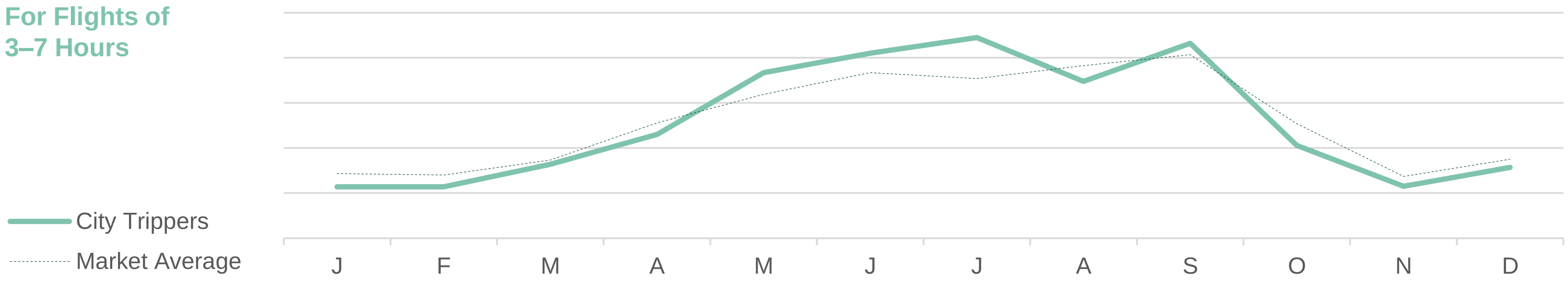
KEY terminology on this page

- **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

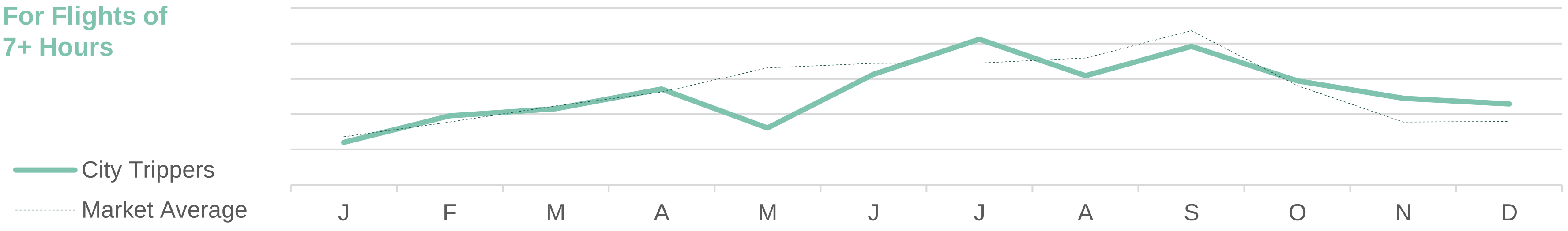
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	40%	122
3-5 Days	19%	83
1 Week Holiday	14%	79
2 Weeks Holiday	6%	79
3 Weeks Or More	2%	74

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	40%	64
International Leisure	29%	109
Business Trip	4%	78
Added Personal To Business	1%	82
Worked During Vacation	2%	82

Incidence is frequency of 2+ times per year

CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**53%**	140
Premium Hotel	**22%**	96
All-inclusive resort	**21%**	114
Vacation Rental (e.g., Airbnb, Vrbo)	**21%**	99
Friend's or family's place	**16%**	107
Budget Hotel	**15%**	120

THOUGHTS ON INDIGENOUS TRAVEL

39%

82 INDEX SCORE

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

5%

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	**76%**	116
I really want to learn about the history of the destinations I visit	**55%**	72
I'm willing to put in the effort while travelling in order to see lesser-known places	**46%**	91
I like to explore places that are off the beaten path and less explored	**37%**	79
I'm open to travelling to destinations with limited tourist infrastructure	**34%**	80
I'm open to visiting destinations with challenging climates or weather conditions	**23%**	87

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- Our travel groups are generally adults only including our partner and friends, and sometimes extended family.
- Our budget is mid-range. We don't often splurge.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**51%**	79
Adult relatives	**28%**	134
Friends	**19%**	136
Kids	**15%**	94
Solo	**11%**	97

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,810

81
INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**48%**	87
It's important to me that I visit somewhere that is open to diversity and inclusion	**46%**	100
I consider the impact that I personally have on the destinations I visit	**34%**	78
Hearing from underrepresented communities is an important part of travelling	**25%**	85
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**21%**	82

32%

PRIORITIZE SUSTAINABLE TRAVEL

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**59%**	116
○ Local restaurants	**52%**	118
○ Street cuisine	**33%**	128
○ Cafes or bakeries	**34%**	125
Shopping	**53%**	135
○ Outdoor markets	**33%**	131
○ Visiting famous shopping centres or areas	**29%**	140
Nightlife	**40%**	157
○ Bars and pubs	**36%**	158
○ Clubs and dancing	**17%**	155
Festivals and events	**36%**	129
○ Music concerts or festivals	**28%**	140
○ Sporting events	**12%**	141
Family-focused attractions	**35%**	105
○ Amusement parks or theme parks	**26%**	108
○ Zoos or aquariums	**20%**	101
Cultural experiences or attractions	**50%**	86
Nature experiences	**25%**	66
Guided tours	**23%**	96
Health and wellness	**20%**	120
Overnight experiences	**16%**	94
Water-based sports	**10%**	95
Casual sports	**8%**	78

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	**76%**	111	**62%**	84
To escape from routine	**56%**	114	**46%**	109
To spend time with family	**43%**	97	**42%**	98
To have fun with friends	**36%**	138	**32%**	135
For adventure and excitement	**27%**	106	**46%**	133
To check off dream travel places	**14%**	84	**18%**	78
For a romantic getaway	**15%**	112	**12%**	109
To have memories from top travel spots	**7%**	87	**14%**	102
To learn through other cultures	**12%**	73	**18%**	82

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	**45%**	144	**37%**	123
Partner / spouse wanted to go	**40%**	78	**35%**	81
Visiting friends / family	**22%**	100	**28%**	97
Special event (e.g., wedding, reunion)	**19%**	101	**14%**	86
Festival or event	**14%**	97	**21%**	113
Kids wanted to go	**12%**	88	**21%**	102

14% 92 INDEX SCORE

Travel aligns with children's school schedule

26% 104 INDEX SCORE

Take time off for vacation during major holidays

8% 74 INDEX SCORE

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

CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We are planners, thinking about trips months in advance. We will secure transportation and accommodation but leave activities until later.

57%

Primary Trip Planner

91
INDEX SCORE

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

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

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 5.5 months
- Travel booking sites / apps

Booked Transportation – 4.4 months
- Direct with company

Booked Accommodation – 4.2 months
- Direct with company

Booked Activities – 1.6 months
- Through a tour operator

7 MONTHS + BEFORE MY TRIP

6 MONTHS BEFORE MY TRIP

5 MONTHS BEFORE MY TRIP

4 MONTHS BEFORE MY TRIP

3 MONTHS BEFORE MY TRIP

2 MONTHS BEFORE MY TRIP

1 MONTH BEFORE MY TRIP

MY TRIP BEGINS!

DURING MY TRIP

FLIGHT OF 7+ HOURS

Started Researching and Planning – 7.0 Months
- Online videos
- Travel booking sites / apps

Booked Transportation – 5.8 months
- Direct with company

Booked Accommodation – 5.8 months
- Travel booking sites / apps

Booked Activities – 3.7 months
- Direct with company

CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Most of our trips are to destinations focussed on fun.
- We also take couples trips like Simplicity Lovers.

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

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

% OF TOTAL TRIPS

16% 132 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	**28%**	
	Non-family only	**15%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Adventure
ACTIVITIES	Local restaurants	**42%**	
	Museums	**41%**	
	Visiting famous shopping centres	**28%**	
KEY BEHAVIOURS	City trip with partner and friends, famous attractions and experiencing nightlife		

% OF TOTAL TRIPS

16% 98 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Friends Trip		
DESTINATION TYPE	Beach resort	**32%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Bars and pubs	**51%**	
	Local restaurants	**44%**	
	Clubs and dancing	**27%**	
KEY BEHAVIOURS	All about fun, nightlife and relaxation with friends, needing a mild comfortable climate		

% OF TOTAL TRIPS

33% 137 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort	**32%**	
	Countryside and village	**24%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Security
ACTIVITIES	Local restaurants	**38%**	
	Outdoor markets	**21%**	
	Nature walks	**19%**	
KEY BEHAVIOURS	Safe, quiet, and reliable couples getaway to escape and relax		

% OF TOTAL TRIPS

27% 168 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only	**51%**	
	Extended family	**22%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Security
ACTIVITIES	Local restaurants	**50%**	
	Cafes or bakeries	**27%**	
	Souvenir shopping	**24%**	
KEY BEHAVIOURS	All-inclusive trip to unwind with partner and extended family		

CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek trendy locations with ease of travel, where festivals, famous attractions, and nightlife are abundant.
- Our travel mainly spans United Kingdom and Europe. Top places in Europe are Spain, Portugal, France, Greece and Italy.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	**30%**	90	Portugal	**5%**	131
Spain	**21%**	145	Italy	**3%**	88
USA	**8%**	119	Germany	**2%**	117
France	**5%**	86	Thailand	**2%**	133
Greece	**5%**	79	Netherlands	**2%**	136

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is easy to travel around once there	**60%**	127
Has famous attractions	**32%**	134
Renowned for food and drink experiences	**31%**	123
Has vibrant nightlife and entertainment	**26%**	151
Has well-developed tourism infrastructure	**23%**	141
Provides a bustling and vibrant city vibe	**17%**	141
Provides a variety of local festivals and events	**17%**	115
Is a trendy destination	**9%**	127

CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

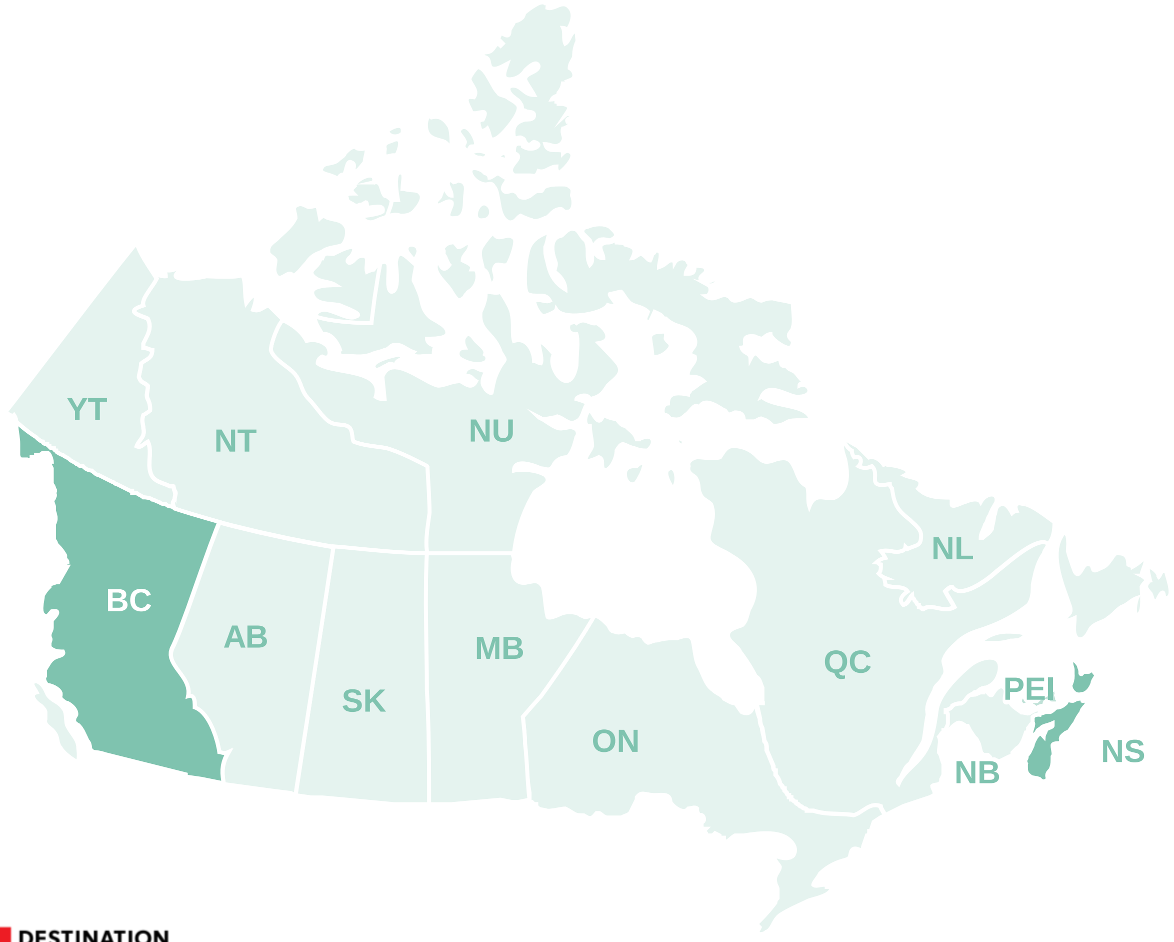
- We haven’t really travelled to Canada and are unlikely to travel in the next few years.
- If we have visited, it was many years ago. Most likely to BC, Ontario or Nova Scotia.
- Any future trip would similarly explore Vancouver or Toronto.

WHERE DO WE WANT TO GO IN CANADA

MONTREAL QUEBEC CITY TORONTO
NIAGARA FALLS
VANCOUVER
OTTAWA BRITISH COLUMBIA
ALBERTA PRINCE EDWARD ISLAND

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	22%	101
BC	45%	127
MB	3%	86
NB	2%	79
NL	2%	74
NS	17%	125
NT	5%	99
NU	2%	97
ON	48%	102
PEI	7%	117
QC	25%	92
SK	3%	89
YT	0%	60

CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- When we have visited Canada we have travelled in the summer months.
- We don’t really know too much about what Canada has to offer.
- To consider Canada we would need to learn about must-see attractions, trendy cities, and how we can easily access all of this.

CANADA TRAVEL MONTHS ON A PAST TRIP

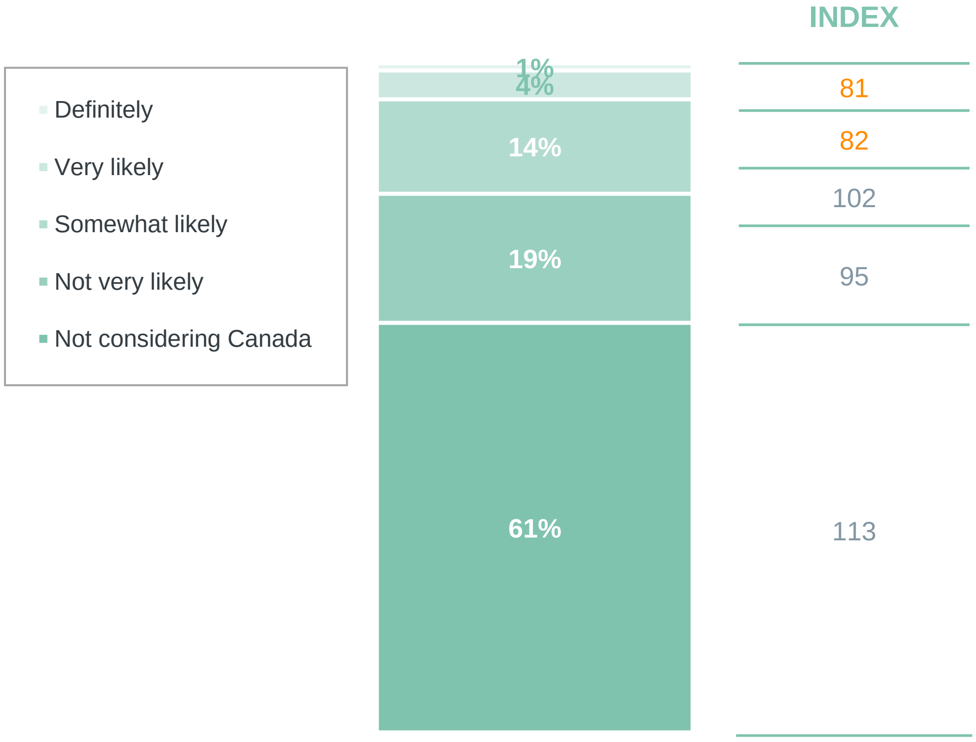
	WINTER (Dec-Feb)	**SPRING** (Mar-May)	**SUMMER** (Jun-Aug)	**AUTUMN** (Sept-Nov)
CITY TRIPPERS	**20%**	**29%**	**59%**	**12%**
VS. TOTAL MARKET	17%	29%	46%	29%

6%

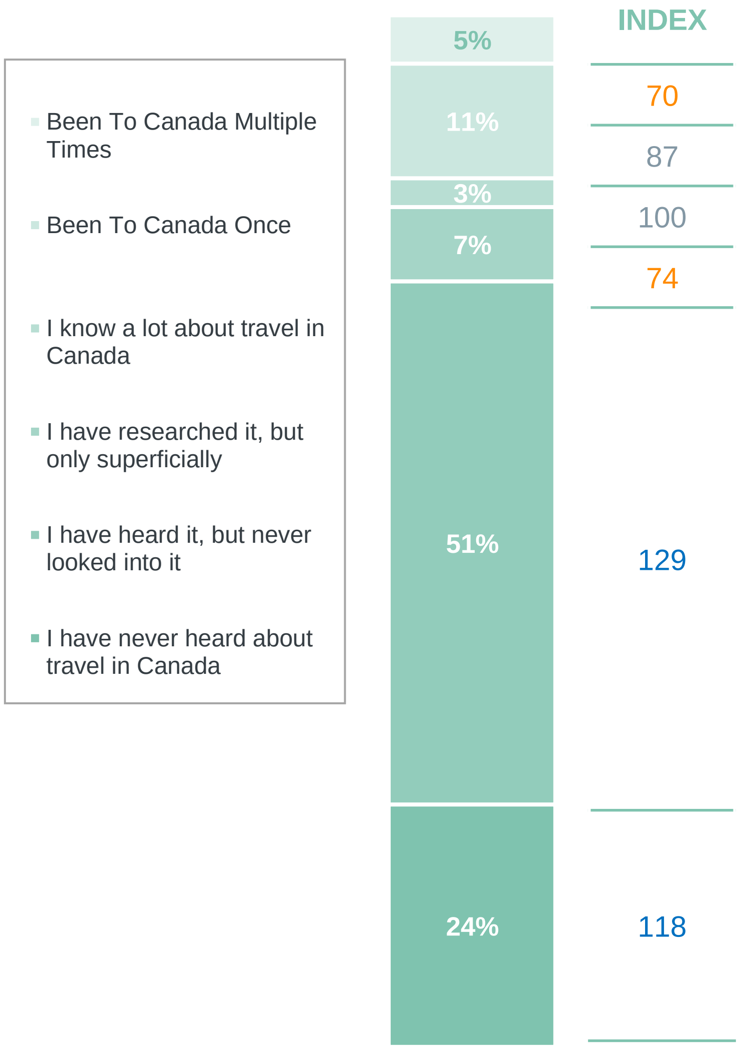
Been to Canada in last 5 years

81 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

5%
Had a child
94 INDEX SCORE

30%
Started a new job / career
119 INDEX SCORE

12%
Bought a new home
100 INDEX SCORE

12%
Moved to a new city
113 INDEX SCORE

3%
Child started school
91 INDEX SCORE

31%
Purchased a car
81 INDEX SCORE

10%
Retired
99 INDEX SCORE

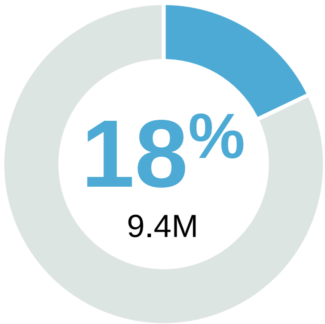
20%
Renovated house
86 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**63%**	104
Experiences (e.g., concerts, events).	**53%**	140
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**41%**	98
Savings and investments	**41%**	80
Fashion and accessories	**33%**	146
Personal care and wellness	**33%**	110

SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



% OF UNITED KINGDOM 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

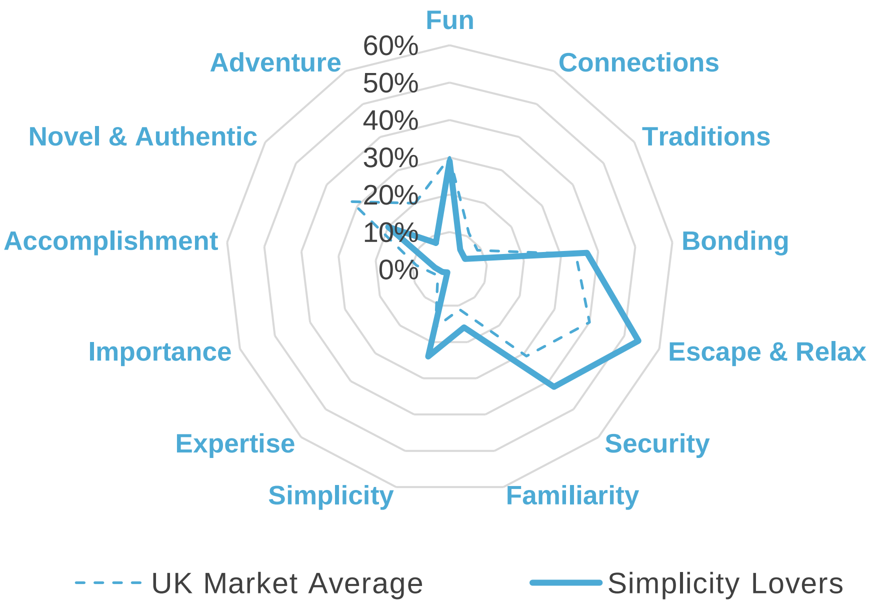
1 We seek peace, relaxation, and familiarity in our travels, preferring easy, affordable destinations with a small-town feel.

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 or seeing the countryside of a small town.

3 Loyal to regular destinations, we are creatures of habit who favor simplicity and serenity over glitz, glamour, and cultural immersion.

4 Hard-to-reach destinations don't attract us, we want ease of access and don't want to worry about how to navigate once we arrive.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

75

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

69

How is this calculated?

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

SIMPLICITY LOVERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Quiet, relaxed experiences are how I take care of myself on vacation	**91%**	136
I'm not influenced by social media content when it comes to travel	**90%**	140
I don't see the point of posting about my trips on social media	**89%**	144
I don't consider diversity and inclusion factors when choosing travel destinations	**75%**	133
While travelling I generally stick to places that are direct and convenient to get to	**69%**	133
I generally don't participate in physical activities during my holidays	**68%**	129
I travel when I need to	**67%**	145
I appreciate diversity but not likely engage deeply with Indigenous cultures	**67%**	129
I seek out destinations that offer quiet opportunities for deep self-reflection	**57%**	132
I generally prefer to go back to the same destinations on holiday	**57%**	144
When travelling I often go to familiar restaurants, stores, and hotels that I recognize from home	**53%**	141
It's not important to me that I come back from travels having learnt something new	**50%**	129
Local cuisine is not a priority for me; I focus on other aspects of travel	**46%**	134

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To find much-needed time to relax	**63%**	132
To escape the demands of everyday life	**57%**	135
To feel safe and secure	**55%**	139
To enjoy simple, straightforward travel	**35%**	148
To be familiar with my surroundings	**21%**	134
To feel confident travel with no surprises	**14%**	128

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	**84%**	139
Safe	**76%**	131
Peaceful	**64%**	149
Reliable	**44%**	134
Familiar	**28%**	140
Practical	**24%**	148

SIMPLICITY LOVERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are generally aged 55+, likely retired.
- Our monthly incomes are lower due to retirement, but our overall net worth is more comfortable.
- Find us in rural or suburban areas.

AGE

	SCORE	INDEX
18-34	**7%**	61
35-54	**27%**	87
55+	**66%**	132
MEAN YEARS	**59.7**	137

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	**26%**	122
>$40K to $120K	**64%**	78
More than $120K	**6%**	77
Refused	**5%**	119

EMPLOYMENT

	SCORE	INDEX
Employed FT	**26%**	57
Employed PT	**11%**	89
Self-employed	**3%**	83
Retired	**48%**	139

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	80
Secondary education	**39%**	135
Post-secondary education	**61%**	66

60%

76 Have a valid passport

GENDER

45%	90	Male
55%	111	Female
0%	83	Non-binary / Other

HOUSEHOLD

9%	85	Children <18 Living At Home*
15%	130	Children 18+ Living At Home*
45%	132	Children NOT Living At Home*
45%	101	No Children

** Option is not exclusive*

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX
South East	**15%**	115
East of England	**12%**	131
North West	**12%**	116
West Midlands	**10%**	102
Yorkshire and The Humber	**9%**	109
Greater London	**9%**	74

	SCORE	INDEX
Scotland	**8%**	106
East Midlands	**7%**	111
South West	**6%**	78
North East	**6%**	121
Wales	**6%**	127

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

81

TRAVEL TRADE INDEX: **GROUP**

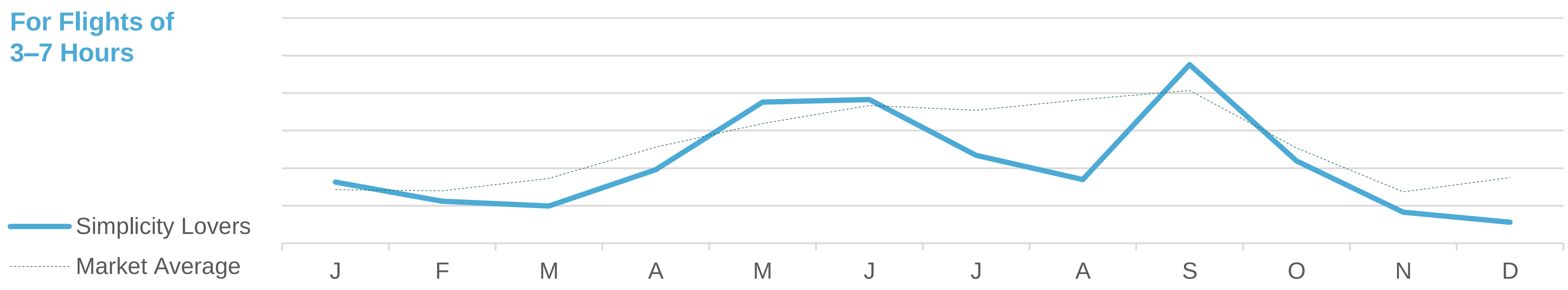
68

KEY terminology on this page

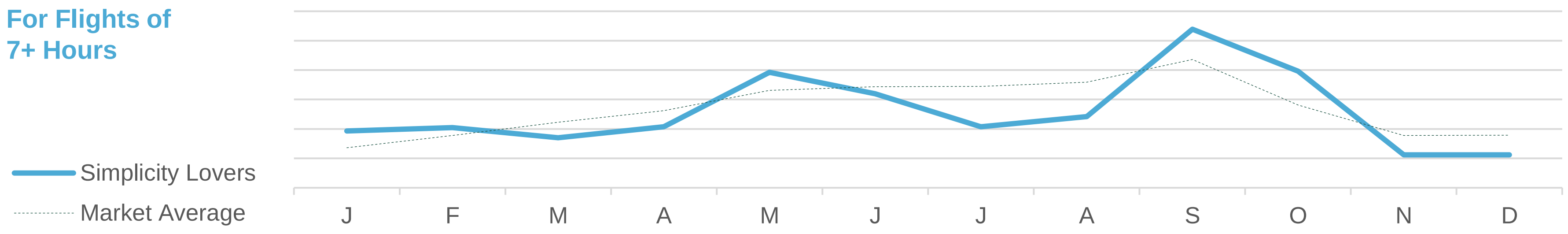
- **TRAVEL TRADE INDEX – NON-GROUP –** The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **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	**31%**	74
3-5 Days	**21%**	90
1 Week Holiday	**16%**	89
2 Weeks Holiday	**6%**	78
3 Weeks Or More	**2%**	79

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	**47%**	138
International Leisure	**16%**	75
Business Trip	**1%**	67
Added Personal To Business	**0%**	78
Worked During Vacation	**1%**	74

Incidence is frequency of 2+ times per year

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**48%**	116
Vacation Rental (e.g., Airbnb, Vrbo)	**24%**	131
Premium Hotel	**17%**	79
Friend's or family's place	**17%**	113
Bed & Breakfast	**13%**	109
All-inclusive resort	**13%**	80

THOUGHTS ON INDIGENOUS TRAVEL

33%

71 INDEX SCORE

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

3%

72 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	**65%**	70
I really want to learn about the history of the destinations I visit	**59%**	81
I'm open to travelling to destinations with limited tourist infrastructure	**37%**	87
I like to explore places that are off the beaten path and less explored	**37%**	79
I'm willing to put in the effort while travelling in order to see lesser-known places	**31%**	67
I'm open to visiting destinations with challenging climates or weather conditions	**15%**	72

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	**68%**	112
Adult relatives	**23%**	100
Friends	**12%**	101
Kids	**10%**	90
Solo	**10%**	90

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,180

63
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	**48%**	88
I consider the impact that I personally have on the destinations I visit	**37%**	84
It's important to me that I visit somewhere that is open to diversity and inclusion	**25%**	67
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**21%**	82
Hearing from underrepresented communities is an important part of travelling	**15%**	70

25%

PRIORITIZE SUSTAINABLE TRAVEL

78 INDEX SCORE

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

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

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Our activities are low-impact, including sightseeing in nature, dining and shopping.
- We like to get outside for walks and would love to see some wildlife.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**48%**	96
○ Local restaurants	**43%**	100
○ Cafes or bakeries	**23%**	90
○ Street cuisine	**13%**	71
Nature experiences	**42%**	107
○ Nature walks	**28%**	118
○ Birdwatching	**8%**	111
Shopping	**39%**	105
○ Outdoor markets	**27%**	113
○ Souvenir shopping	**17%**	100
Health and wellness	**16%**	88
○ Spas	**10%**	81
○ Outdoor hot tub or bath	**6%**	76
Cultural experiences or attractions	**49%**	83
○ Historical or archeological sites	**34%**	94
○ Museums	**32%**	88
Family-focused attractions	**25%**	94
Guided tours	**17%**	79
Festivals and events	**11%**	71
Overnight experiences	**10%**	69
Casual sports	**9%**	87
Nightlife	**5%**	80
Water-based sports	**4%**	75

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	89%	135	81%	144
To escape from routine	65%	130	63%	147
To spend time with family	50%	105	49%	109
To have fun with friends	17%	90	16%	94
To check off dream travel places	10%	67	17%	75
For a romantic getaway	13%	94	8%	89
To learn through other cultures	16%	86	17%	81
For adventure and excitement	11%	61	16%	66
To seek solitude and isolation	7%	101	5%	96

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	55%	106	58%	119
Visiting friends / family	19%	87	30%	103
Family / friends wanted to go	22%	61	23%	82
Special event (e.g., wedding, reunion)	8%	67	10%	76
Festival or event	5%	71	3%	47
Kids wanted to go	7%	83	9%	90

11% 89 INDEX SCORE

Travel aligns with children's school schedule

13% 79 INDEX SCORE

Take time off for vacation during major holidays

8% 75 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.

45%

Primary Trip Planner

62
INDEX SCORE

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

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

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 6.0 months
- Travel review sites
- Travel agents / advisors

Booked Transportation – 5.0 months
- Direct with company

Booked Accommodation – 5.0 months
- Direct with company

Booked Activities – 2.8 months
- No need to book

FLIGHT OF 7+ HOURS

Started Researching and Planning – 7.7 Months
- Recommendations from friends or family

Booked Transportation – 6.5 months
- Direct with company

Booked Accommodation – 6.4 months
- Travel booking sites / apps

Booked Activities – 3.5 months
- Direct with company

7 MONTHS +
BEFORE MY TRIP

6 MONTHS
BEFORE MY TRIP

5 MONTHS
BEFORE MY TRIP

4 MONTHS
BEFORE MY TRIP

3 MONTHS
BEFORE MY TRIP

2 MONTHS
BEFORE MY TRIP

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

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

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

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

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

23% 144 INDEX SCORE ● ● ● ● ●

TRIP TYPE	Countryside & Village		
COMPANIONS	Couple only	**52%**	
	Extended family	**28%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Local restaurants	**40%**	
	Nature walks	**35%**	
	Souvenir shopping	**19%**	
KEY BEHAVIOURS	Seeking peaceful quiet destination, no crowds, staying in a vacation rental		

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

30% 165 INDEX SCORE ● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only	**51%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Security
ACTIVITIES	Local restaurants	**50%**	
	Cafes or bakeries	**27%**	
	Souvenir shopping	**24%**	
KEY BEHAVIOURS	Seeking mild climate to relax. Moderate budget, staying in a hotel or all-inclusive resort		

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

16% 125 INDEX SCORE ● ● ● ● ●

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only	**49%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Novel & Authentic
ACTIVITIES	Outdoor markets	**23%**	
	Nature walks	**19%**	
	Visiting local monuments	**16%**	
KEY BEHAVIOURS	Likely visiting friends, which drives the destination choice and activities		

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

9% 107 INDEX SCORE ● ● ● ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	**28%**	
	Extended family	**25%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Adventure
ACTIVITIES	Museums	**41%**	
	Bars and pubs	**38%**	
	Cafes or bakeries	**29%**	
KEY BEHAVIOURS	Trip with friends to explore a familiar city, dine out, and have fun		

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek comfortable destinations that are easy to access, where we don’t have to learn a new language.
- We take shorter trips, mostly domestic and within Europe a little closer to home.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
UK	**57%**	142
Spain	**15%**	110
Greece	**7%**	131
France	**4%**	74
USA	**4%**	67

	SCORE	INDEX
Portugal	**4%**	106
Italy	**3%**	75
Norway	**1%**	110
Germany	**1%**	65
Croatia	**1%**	79

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	**67%**	133
Is easy to travel to	**66%**	135
Isn’t too crowded	**64%**	143
Is easy to travel around once there	**63%**	131
Doesn’t take too long to get there	**49%**	145
Has a mild and pleasant climate	**44%**	141
Provides a sense of personal safety	**42%**	135
Language is not a barrier	**37%**	142

SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

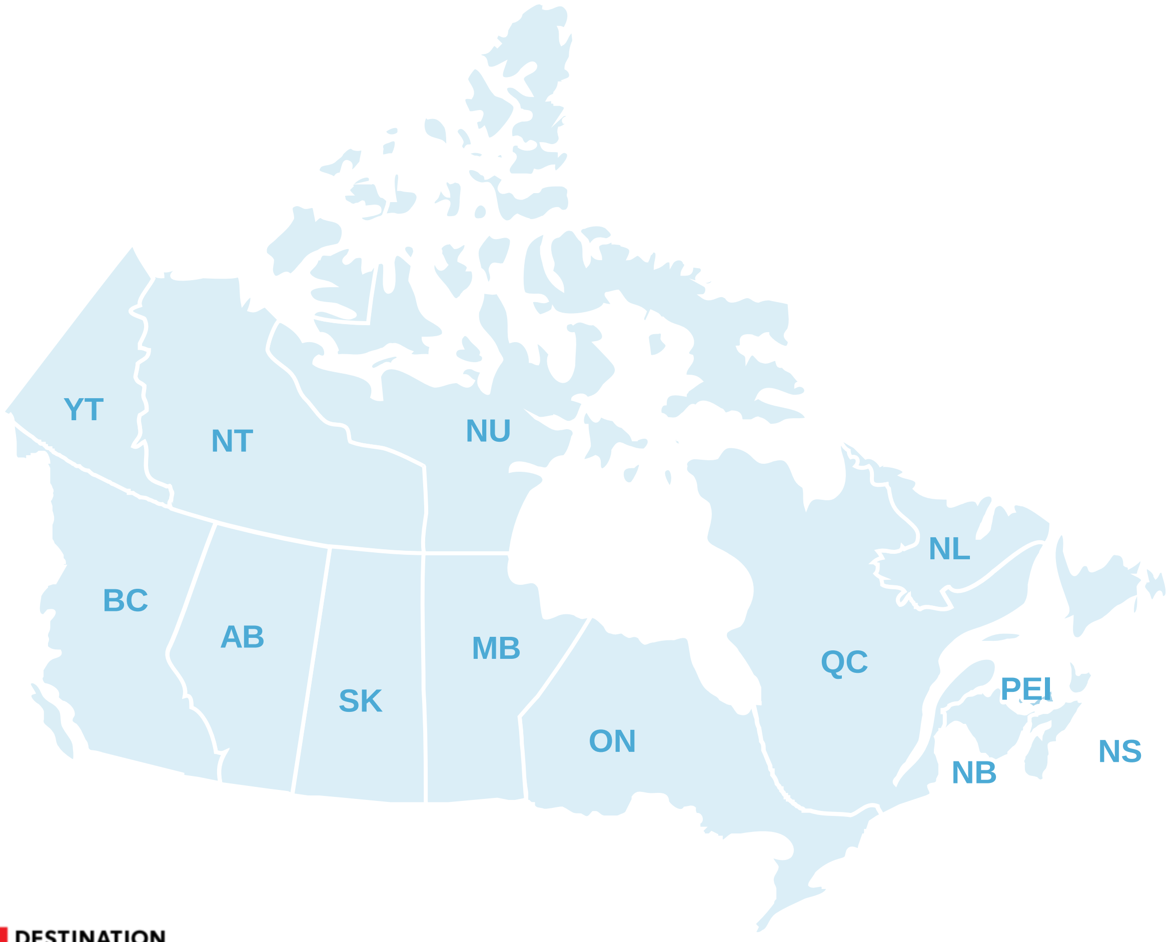
OVERALL INSIGHT

- We likely haven't been to Canada before, and don't know too much about it as a travel destination.
- For those of us thinking about Canada, we'll be exploring Toronto, Vancouver, Calgary and Niagara Falls.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	19%	89
BC	34%	89
MB	0%	68
NB	1%	72
NL	3%	76
NS	3%	69
NT	0%	58
NU	3%	100
ON	49%	108
PEI	5%	93
QC	22%	68
SK	0%	68
YT	1%	76

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- If we have visited, it was many years ago.
- We gravitate to the spring and fall seasons to avoid crowds and take advantage of lower prices, though less pleasant climate can be a barrier.

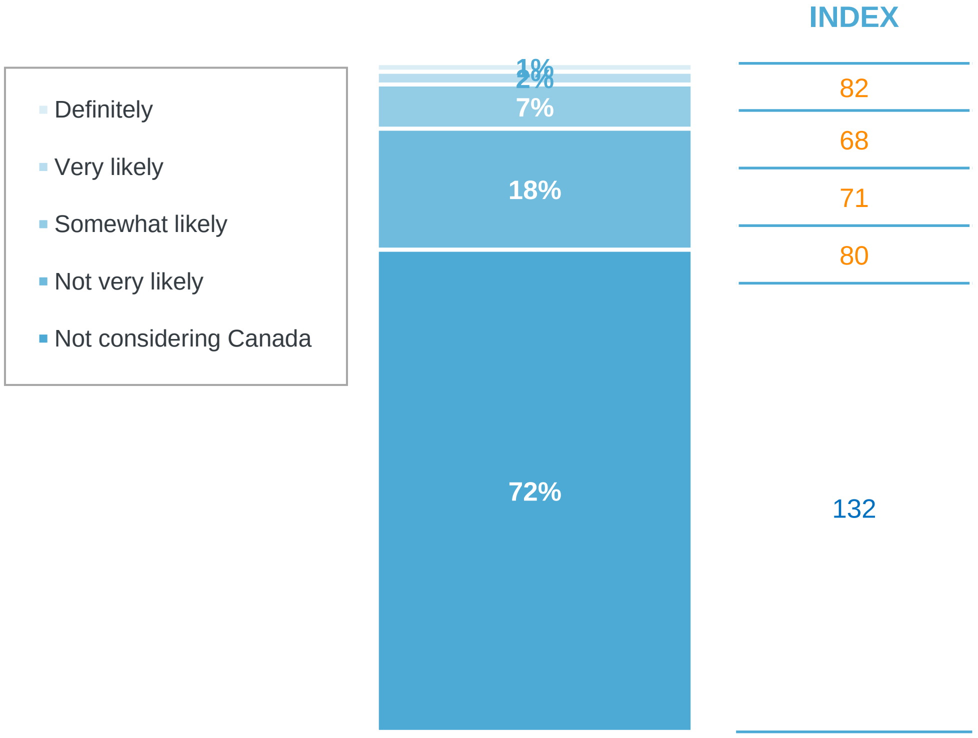
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	**SPRING** (Mar-May)	**SUMMER** (Jun-Aug)	**AUTUMN** (Sept-Nov)
SIMPLICITY LOVERS	**13%**	**24%**	**41%**	**38%**
VS. TOTAL MARKET	17%	29%	46%	29%

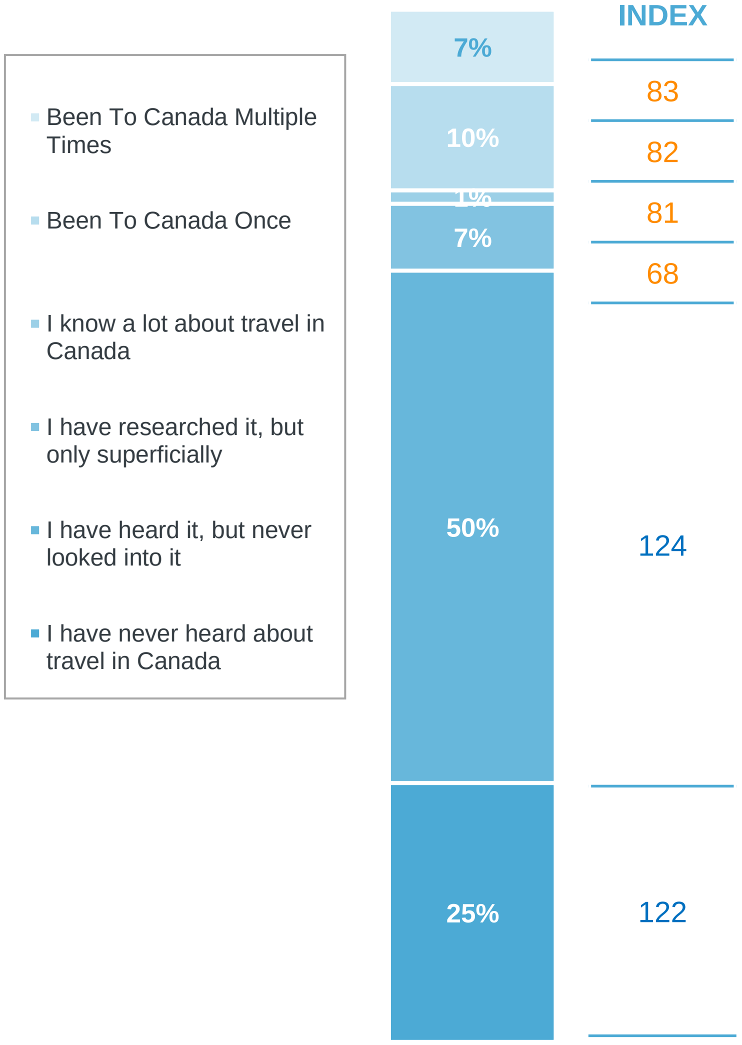
4% Been to Canada in last 5 years

72 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



SIMPLICITY LOVERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

1%
Had a child
86 INDEX SCORE

11%
Started a new job / career
55 INDEX SCORE

6%
Bought a new home
73 INDEX SCORE

4%
Moved to a new city
70 INDEX SCORE

1%
Child started school
88 INDEX SCORE

31%
Purchased a car
82 INDEX SCORE

16%
Retired
129 INDEX SCORE

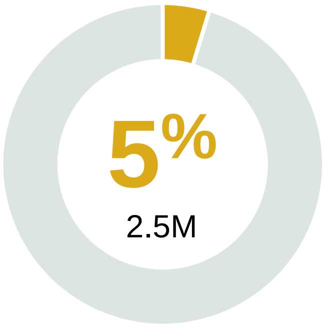
19%
Renovated house
78 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**59%**	91
Savings and investments	**53%**	120
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**46%**	123
Personal care and wellness	**34%**	121
Experiences (e.g., concerts, events).	**33%**	71
Home and decor	**32%**	125

FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF UNITED KINGDOM 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. Occasionally we splurge on a major family trip, or take a simple couples trip to relax.

WHAT YOU NEED TO KNOW ABOUT ME

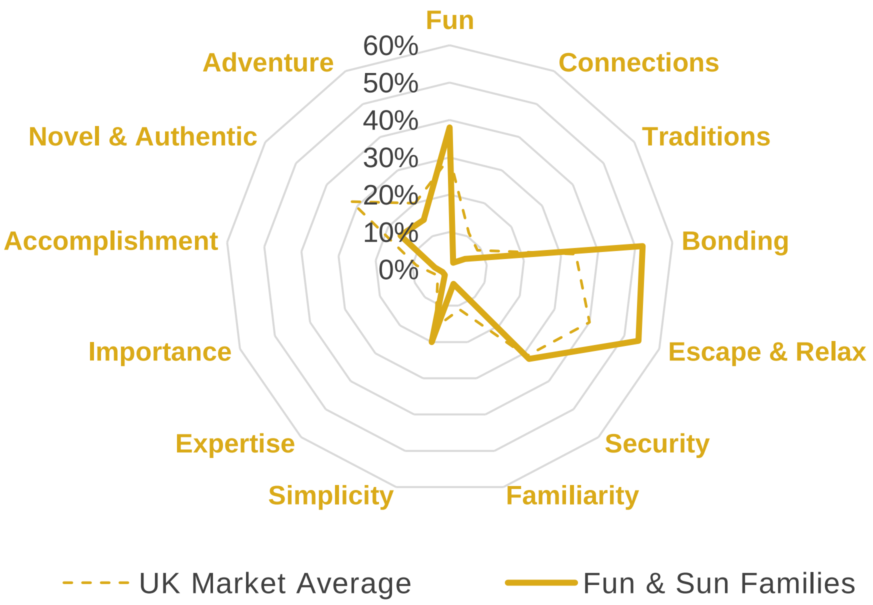
1 We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences, even if luxury is within reach.

2 Our trips are escapes from everyday life, focusing on creating lasting memories through fun and simple activities.

3 We plan our annual 1-week vacation a few months in advance, relying on booking and review sites / apps, social media and recommendations.

4 While we mostly travel close to home on quick getaways, we are dreaming of a Disney or beach vacation.

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

70

How is this calculated?

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

FUN & SUN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally only choose destinations with comfortable climate and weather conditions	**84%**	126
I generally avoid places that are challenging or difficult to reach	**81%**	135
I prefer destinations with well-established tourist infrastructure	**73%**	133
I tend to choose a destination to visit based off value for money	**71%**	144
I generally don’t think much on the impact that I personally have on the destinations I visit	**70%**	129
I generally don’t try to learn local languages	**69%**	133
While travelling I generally stick to places that are direct and convenient to get to	**67%**	130
I appreciate diversity but not likely engage deeply with Indigenous cultures	**67%**	130
I generally stick to the most popular areas when I visit somewhere	**67%**	126
It’s not important to me that I come back from travels having learnt something new	**56%**	141
I’m more interested in the present and don’t focus much on the history of where I visit	**47%**	132
Local cuisine is not a priority for me; I focus on other aspects of travel	**46%**	135
I generally prefer to go back to the same destinations on holiday	**44%**	121

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	**69%**	142
To just enjoy myself and have fun	**69%**	130
To find much-needed time to relax	**62%**	130
To escape the demands of everyday life	**54%**	128
To let loose and forget about day-to-day life	**40%**	140
To bond through shared experiences	**35%**	147

DESIRED DESTINATION

	SCORE	INDEX
Safe	**73%**	126
Friendly	**70%**	124
Relaxed	**68%**	114
Fun	**59%**	134
Reliable	**43%**	132
Familiar	**23%**	126

FUN & SUN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We likely have more than one child, spanning a range of ages.
- We are more likely to be female.
- We are primarily employed earning a modest income, and some of us are working as full-time parents.

AGE

	SCORE	INDEX
18-34	**29%**	104
35-54	**61%**	156
55+	**10%**	64
MEAN YEARS	**41.4**	73

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	**18%**	86
>$40K to $120K	**70%**	131
More than $120K	**7%**	88
Refused	**5%**	131

EMPLOYMENT

	SCORE	INDEX
Employed FT	**53%**	117
Employed PT	**24%**	153
Self-employed	**1%**	55
Retired	**5%**	67

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	80
Secondary education	**32%**	116
Post-secondary education	**68%**	84

53%

60 Have a valid passport

GENDER

31%	50	Male
69%	150	Female
0%	83	Non-binary / Other

HOUSEHOLD

90%	146	Children <18 Living At Home*
8%	76	Children 18+ Living At Home*
6%	64	Children NOT Living At Home*
4%	56	No Children

** Option is not exclusive*

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX
East of England	**12%**	131
South East	**12%**	85
Yorkshire and The Humber	**12%**	142
East Midlands	**12%**	154
South West	**11%**	137
North West	**10%**	85

	SCORE	INDEX
West Midlands	**9%**	92
Greater London	**8%**	71
Scotland	**7%**	78
North East	**4%**	100
Wales	**4%**	50

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

102

TRAVEL TRADE INDEX: **GROUP**

79

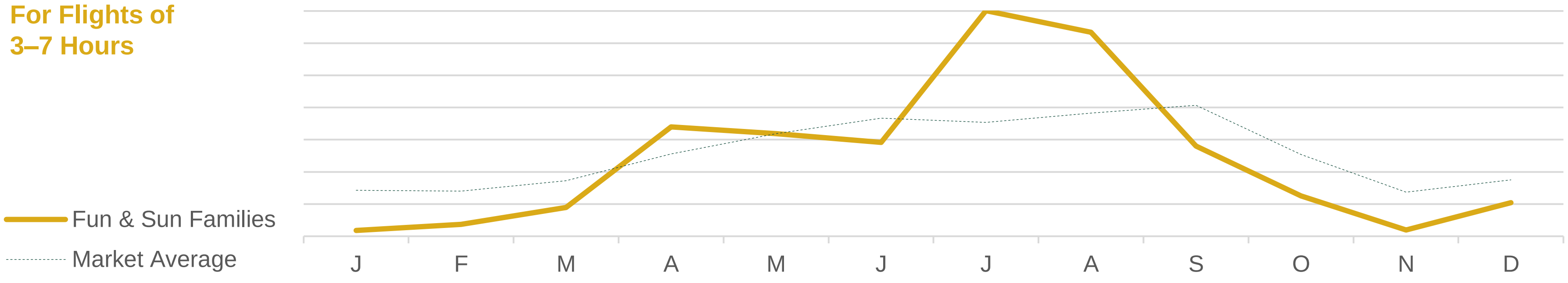
KEY terminology on this page

- **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

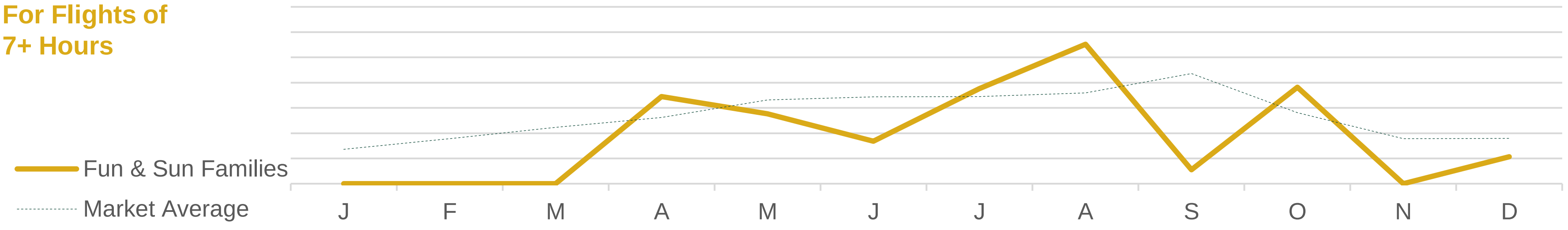
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	31%	73
3-5 Days	12%	47
1 Week Holiday	10%	52
2 Weeks Holiday	2%	60
3 Weeks Or More	1%	68

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	44%	101
International Leisure	11%	64
Business Trip	6%	85
Added Personal To Business	1%	81
Worked During Vacation	0%	69

Incidence is frequency of 2+ times per year

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**41%**	88
Campsite	**26%**	158
All-inclusive resort	**25%**	134
Vacation Rental (e.g., Airbnb, Vrbo)	**22%**	114
Premium Hotel	**14%**	71
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	**14%**	131

THOUGHTS ON INDIGENOUS TRAVEL

33%

70 INDEX SCORE

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

3%

72 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	**67%**	77
I really want to learn about the history of the destinations I visit	**53%**	68
I like to explore places that are off the beaten path and less explored	**34%**	74
I'm willing to put in the effort while travelling in order to see lesser-known places	**33%**	70
I'm open to travelling to destinations with limited tourist infrastructure	**27%**	67
I'm open to visiting destinations with challenging climates or weather conditions	**16%**	74

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
Spouse / Partner	**81%**	137
Kids	**80%**	151
Adult relatives	**27%**	130
Friends	**4%**	67
Solo	**2%**	65

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,220

93
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	**39%**	58
It's important to me that I visit somewhere that is open to diversity and inclusion	**37%**	86
I consider the impact that I personally have on the destinations I visit	**30%**	71
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**20%**	79
Hearing from underrepresented communities is an important part of travelling	**18%**	75

23%

PRIORITIZE SUSTAINABLE TRAVEL

74 INDEX SCORE

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

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

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	**86%**	157
○ Zoos or aquariums	**64%**	158
○ Amusement parks or theme parks	**63%**	157
○ Space or science centres	**24%**	152
Shopping	**45%**	118
○ Outdoor markets	**33%**	129
○ Souvenir shopping	**33%**	147
Cultural experiences or attractions	**41%**	63
○ Visiting local monuments	**26%**	75
○ Museums	**25%**	63
Nature experiences	**31%**	81
○ Nature walks	**21%**	96
○ Camping	**10%**	137
Local cuisine	**28%**	59
○ Local restaurants	**25%**	63
○ Cafes or bakeries	**15%**	65
Festivals and events	**18%**	87
Health and wellness	**14%**	69
Guided tours	**13%**	66
Nightlife	**12%**	95
Casual sports	**11%**	103
Water-based sports	**8%**	91
Overnight experiences	**8%**	64

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	91%	159	77%	153
To relax and unwind	69%	96	73%	120
To escape from routine	66%	133	61%	142
For adventure and excitement	22%	91	22%	79
To have fun with friends	5%	62	22%	109
To learn through other cultures	9%	66	0%	49
To check off dream travel places	20%	119	23%	96
To have memories from top travel spots	2%	65	0%	49
To learn about your own history or ancestry	0%	72	0%	64

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	67%	129	78%	153
Kids wanted to go	71%	150	65%	146
Family / friends wanted to go	33%	100	45%	146
Visiting friends / family	13%	64	22%	76
Special event (e.g., wedding, reunion)	11%	77	11%	79
Festival or event	5%	72	17%	98

70% 149 INDEX SCORE

Travel aligns with children's school schedule

45% 141 INDEX SCORE

Take time off for vacation during major holidays

17% 128 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 well in advance - thinking about it at least 6 months in advance.

56%

Primary Trip Planner

88
INDEX SCORE

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

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

FLIGHT OF
3–7 HOURS

Started Researching and Planning – 6.7 months
- Travel review sites
- Travel booking sites / apps

Booked Accommodation – 6.0 months
- Travel booking sites / apps

Booked Transportation – 5.7 months
- Travel booking sites / apps

Booked Activities – 2.6 months
- Travel booking sites / apps

7 MONTHS +
BEFORE MY TRIP

6 MONTHS
BEFORE MY TRIP

5 MONTHS
BEFORE MY TRIP

4 MONTHS
BEFORE MY TRIP

3 MONTHS
BEFORE MY TRIP

2 MONTHS
BEFORE MY TRIP

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP

FLIGHT OF
7+ HOURS

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

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 and Simplicity Lovers.

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

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

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

39% 178 INDEX SCORE ● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids	**56%**	
	Extended family	**35%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Souvenir shopping	**40%**	
	Amusement parks or theme parks	**30%**	
	Swimming	**15%**	
KEY BEHAVIOURS	Planned in advance, all-inclusive resort, often with extended family		

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

54% 145 INDEX SCORE ● ● ● ● ●

TRIP TYPE	Family Trip		
DESTINATION TYPE	Countryside and village	**19%**	
	Small cities and town	**11%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Zoos or aquariums	**28%**	
	Cafes or bakeries	**21%**	
	Visiting famous shopping centres	**18%**	
KEY BEHAVIOURS	All about kids, famous attractions, vacation rental or could be camping		

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

16% 123 INDEX SCORE ● ● ● ○ ○

TRIP TYPE	Countryside & Village		
COMPANIONS	Couple only	**52%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Simplicity
ACTIVITIES	Local restaurants	**40%**	
	Nature walks	**35%**	
	Visiting local monuments	**20%**	
KEY BEHAVIOURS	Couples trip to slow down and spend time outside. Staying in a vacation rental		

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

11% 109 INDEX SCORE ● ● ○ ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Nuclear family with kids	**64%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Outdoor markets	**35%**	
	Street cuisine	**25%**	
	Museums	**21%**	
KEY BEHAVIOURS	Exploring a bucket list destination, seeking adventure, higher budget		

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are kid-friendly, easy to access, and offer packages to make our lives easier.
- Most of our travel stays close to home, In the UK or other more northern European countries.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	**50%**	129	USA	**3%**	60
Spain	**14%**	102	Netherlands	**2%**	145
France	**7%**	120	Poland	**2%**	145
Greece	**5%**	69	Italy	**2%**	64
Portugal	**3%**	96	Belgium	**1%**	128

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	**82%**	144
Is not too expensive	**59%**	123
Is easy to travel to	**55%**	121
Is easy to travel around once there	**47%**	106
Good connectivity (Wi-Fi, cell service, etc.)	**40%**	139
Doesn't take too long to get there	**30%**	112
Has packaged holiday / vacation offers	**30%**	148
Offers all-inclusive resort packages	**19%**	119

FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

- If we have visited, it was many years ago.
- If we visit Canada, we would consider Toronto, Vancouver, and Niagara Falls.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers

PROVINCES	%	INDEX
AB	14%	63
BC	35%	93
MB	0%	68
NB	0%	65
NL	0%	57
NS	0%	59
NT	0%	58
NU	0%	74
ON	58%	150
PEI	0%	45
QC	21%	60
SK	0%	68
YT	0%	60

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE 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.
- We are unlikely to visit in the next few years.

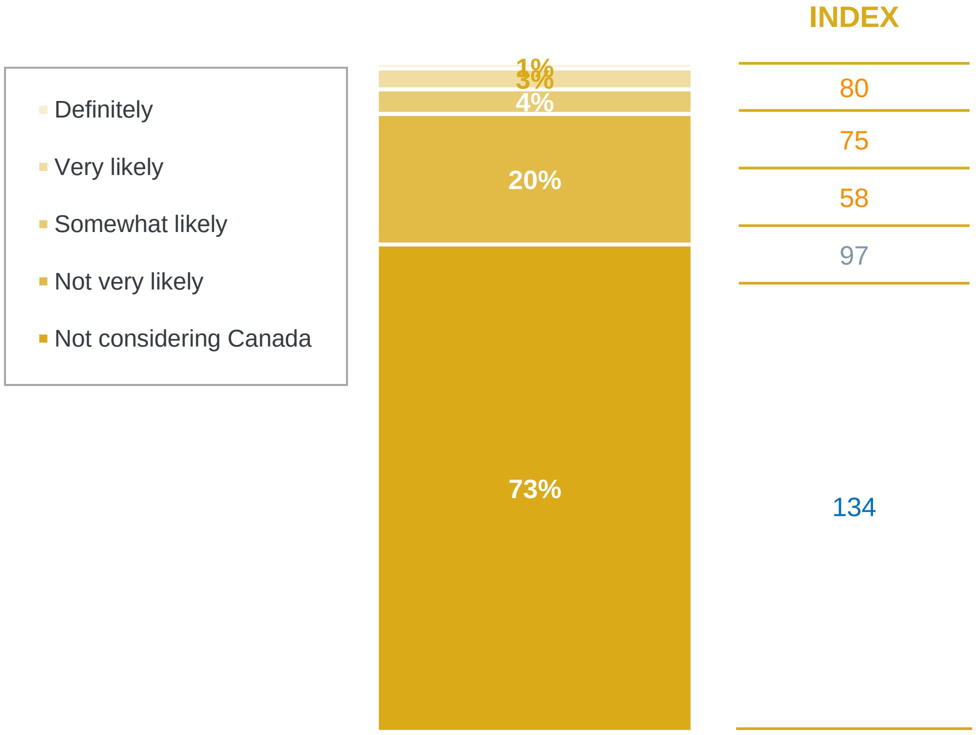
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	**28%**	**30%**	**35%**	**21%**
VS. TOTAL MARKET	17%	29%	46%	29%

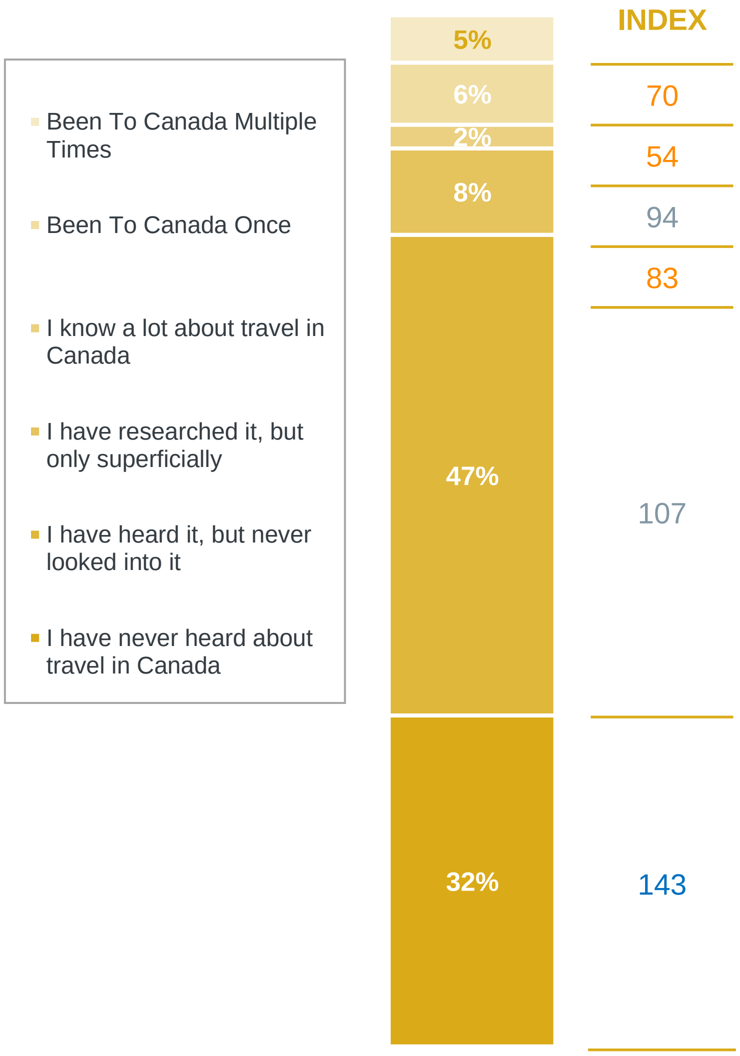
4% Been to Canada in last 5 years

70 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



FUN & SUN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- We are building our families, and the major events in our life revolve around that. This includes the big items, like a home, renovations, 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

30%
Had a child
149 INDEX SCORE

31%
Started a new job / career
121 INDEX SCORE

11%
Bought a new home
100 INDEX SCORE

7%
Moved to a new city
84 INDEX SCORE

30%
Child started school
141 INDEX SCORE

35%
Purchased a car
96 INDEX SCORE

0%
Retired
57 INDEX SCORE

22%
Renovated house
101 INDEX SCORE

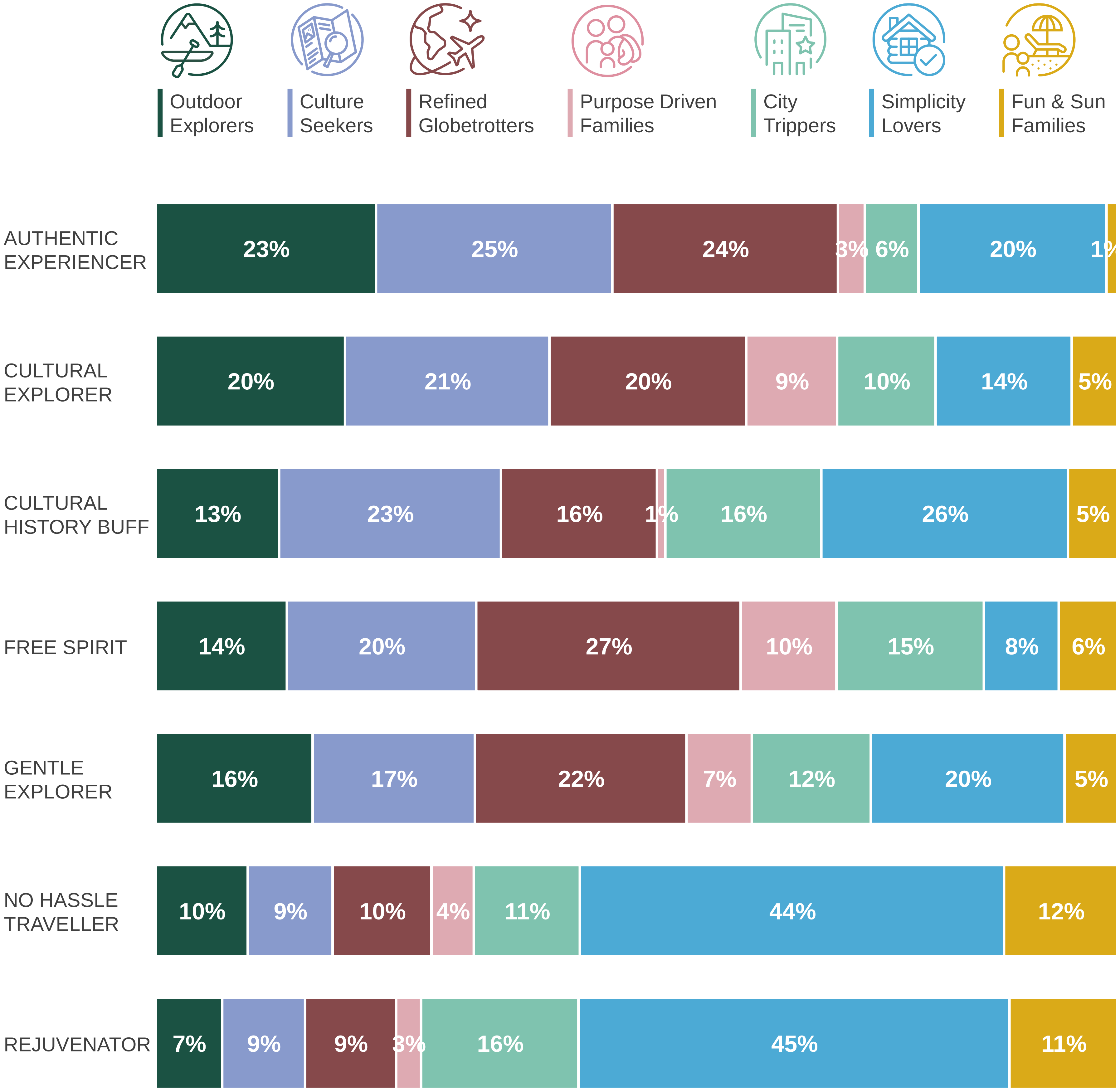
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	51%	69
Experiences (e.g., concerts, events).	47%	120
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	41%	95
Home and decor	37%	143
Personal care and wellness	35%	134
Savings and investments	32%	45

EXPLORER QUOTIENT MAPPING

MARKET LEVEL SEGMENT DISTRIBUTION ACROSS EQ SEGMENTS

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



GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

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

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).