UNITED STATES MARKET PROFILES

The US travel market stands as a colossal force within the global tourism landscape, wielding considerable economic influence and setting trends that reverberate across borders.

American travellers embark on journeys not only for leisure but also for cultural immersion and rejuvenating escapes.

UNITED STATES

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

- Overall, Americans seek fun, enjoyment, and a sense of adventure when travelling.
- When selecting destinations they often seek ease of travel, and a friendly destination that doesn't require learning a new language, and familiar accommodation options.
- Unique destinations with access to the outdoors or festivals and events are important. Help them find the hidden gems.

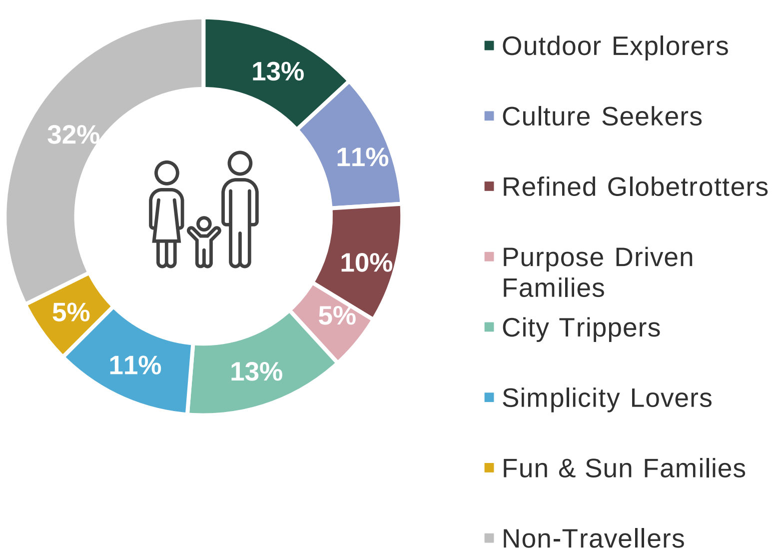
The US market overindexes most notably in terms of Outdoor Explorers, City Trippers, and Fun & Sun Families.

The market has a high prevalence of bonding and adventure as base motivations to travel.Travellers from the United States often look for hidden gems, outdoor adventure opportunities, and are more likely to look for festivals & events compared to the rest of the globe.

American travellers often take pride in their independence and generally state they are not influenced by what destinations are popular.

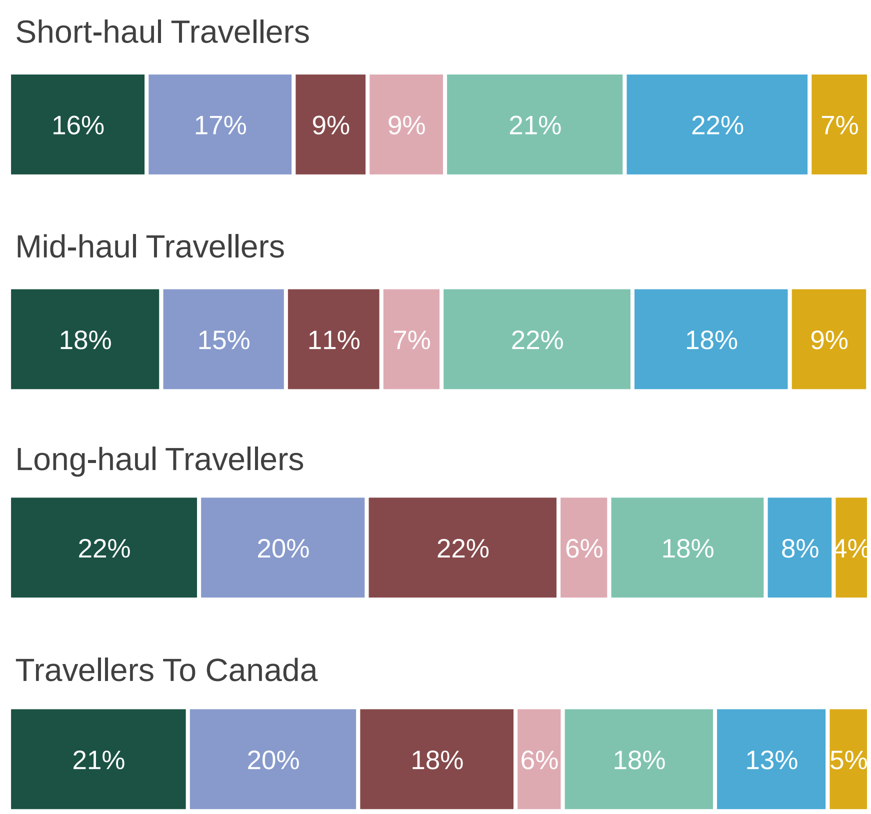
MARKET SIZING

POPULATION BREAKDOWN



32.4% of the US adult population (est. **253M**) are non-travellers (est. **81M**). 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+ 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

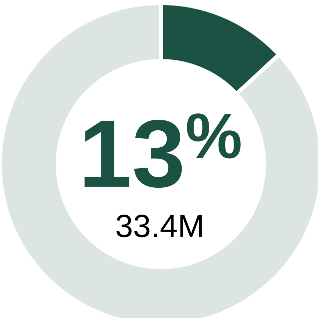
	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	**33.4M**	**Yes**	○ Nature Experiences ○ Water Sports ○ Casual Sports	○ Adventure ○ Novel & Authentic ○ Accomplishment
CULTURE SEEKERS	**27.5M**	**Yes**	○ Cultural Experiences & Attractions ○ Festivals & Events ○ Nightlife	○ Novel & Authentic ○ Connections ○ Familiarity
REFINED GLOBETROTTERS	**24.6M**	**Yes**	○ Cultural Experiences & Attractions ○ Cuisine ○ Guided Tours	○ Novel & Authentic ○ Bonding ○ Fun
PURPOSE DRIVEN FAMILIES	**11.2M**	No	○ Family-Focused Attractions ○ Festivals & Events ○ Cultural Experiences & Attractions	○ Bonding ○ Novel & Authentic ○ Traditions
CITY TRIPPERS	**33.3M**	No	○ Festivals & Events ○ Cuisine ○ Shopping	○ Fun ○ Escape & Relax ○ Bonding
SIMPLICITY LOVERS	**28.2M**	No	○ Cuisine ○ Nature Experiences ○ Shopping	○ Escape & Relax ○ Security ○ Simplicity
FUN & SUN FAMILIES	**12.8M**	No	○ Family-Focused Attractions ○ Nature Experiences ○ Shopping	○ Bonding ○ Escape & Relax ○ Fun

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

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

OUTDOOR EXPLORERS

PSYCHOGRAPHICS – SUMMARY



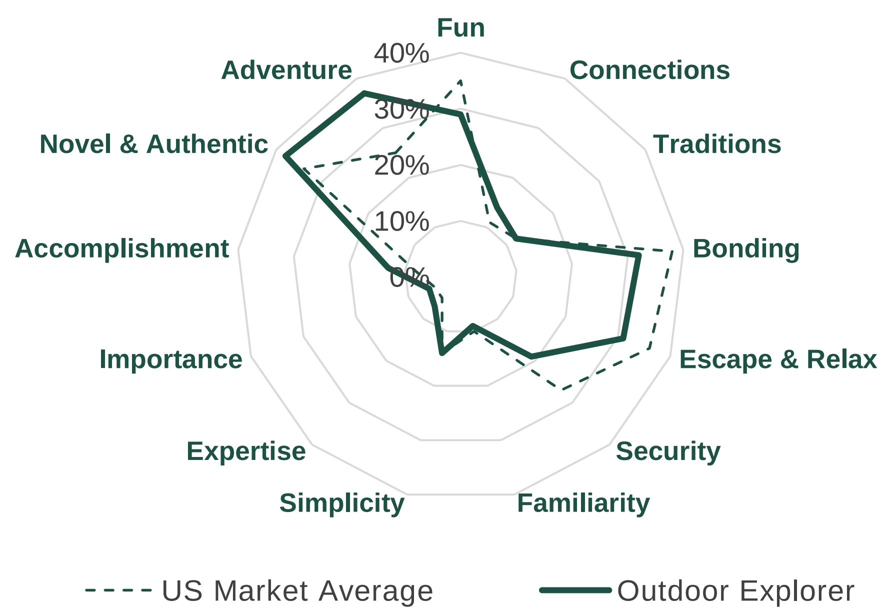
% OF US POPULATION

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. Participating in novel adventure experiences is important, and overcoming a challenge provides a sense of accomplishment we crave.
3. Activity and sports help us relax, and it's our version of self-care.
4. Like to get off the beaten path, open to visiting places with less infrastructure and more challenging climates.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

111

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

104

How is this calculated?

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

OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We value outdoor experiences for how they make us feel, and aren't afraid of the effort it takes to find them.
- Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment.
- We seek adventurous, authentic, and unexplored destinations.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like my holiday to have some form of physical activity	83%	142
I'm passionate about travelling	79%	117
I'm always on the look out for new destinations to visit next	78%	116
I generally think natural attractions (e.g., mountains, waterfalls) are the highlights of my trip	77%	148
When I travel to natural environments it makes me reflect on how fortunate I am	74%	130
I like to come back from travels having learnt something new	73%	109
I go where I want to go, no matter the hurdles	62%	128
I am more likely to select destinations / activities that invest in socially responsible tourism	55%	109
I feel best on vacation when being highly active	52%	127
I enjoy living in the moment while travelling and don't worry much about what comes next	50%	132
I'm open to unconventional accommodations when travelling	45%	132
I like to keep my travel plans flexible and often book on short notice	39%	128
I'd be open to using AI-powered chatbots for travel planning and assistance	29%	116

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	51%	109
To feel a sense of adventure	48%	144
To have authentic experiences	36%	109
To be proud to share my travel experiences	27%	126
To feel like I've accomplished something	13%	137
To push my limits and challenge myself	13%	138

DESIRED DESTINATION

	SCORE	INDEX
Adventurous	61%	148
Unique	35%	112
Unexplored	19%	149
Free-Spirited	13%	110
Passionate	10%	103
Trendy	6%	109

OUTDOOR EXPLORERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We span an range of age categories, and likely don't have children in the home.
- Generally employed and still working.
- We often overindex for more central states.

AGE

	SCORE	INDEX
18-34	**31%**	108
35-54	**30%**	94
55+	**38%**	98
MEAN YEARS	**47.3**	94

HH INCOME (CAD)

	SCORE	INDEX
$70K or less	**21%**	100
>$70K to $275K	**66%**	101
More than $275K	**10%**	106
Refused	**3%**	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	**53%**	105
Employed PT	**9%**	111
Self-employed	**4%**	91
Retired	**23%**	96

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	84
Secondary education	**27%**	100
Post-secondary education	**73%**	101

73%
103 Have a valid passport

GENDER

59% 123 Male

41% 78 Female

0% 82 Non-binary / Other

HOUSEHOLD

25% 99 Children <18 Living At Home*

8% 95 Children 18+ Living At Home*

25% 100 Children NOT Living At Home*

50% 102 No Children

** Option is not exclusive*

US STATE BREAKOUT

	SCORE	INDEX
California	**11%**	91
Texas	**8%**	114
New York	**8%**	100
Florida	**7%**	85
Georgia	**5%**	138
Minnesota	**4%**	142

	SCORE	INDEX
Pennsylvania	**4%**	98
Michigan	**4%**	114
Colorado	**3%**	117
Illinois	**3%**	63
Ohio	**3%**	100
Arizona	**3%**	98

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

100

TRAVEL TRADE INDEX: **GROUP**

105

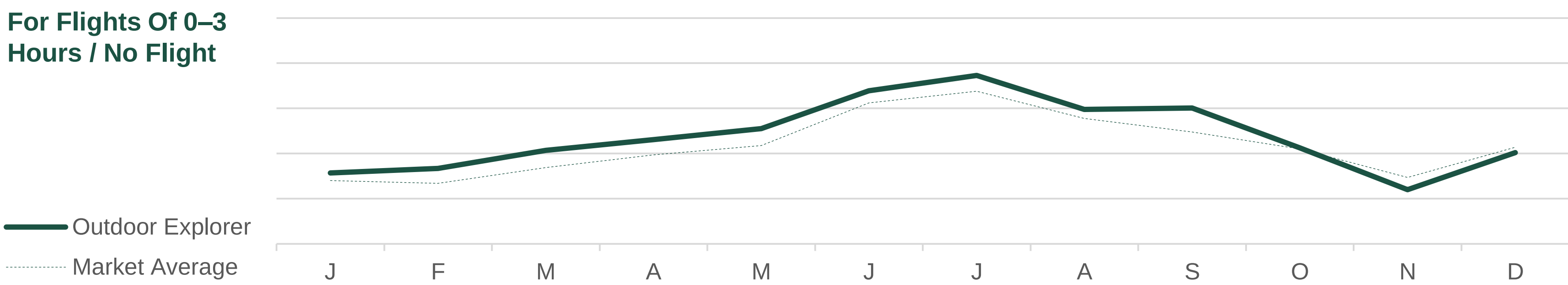
KEY terminology on this page

- **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

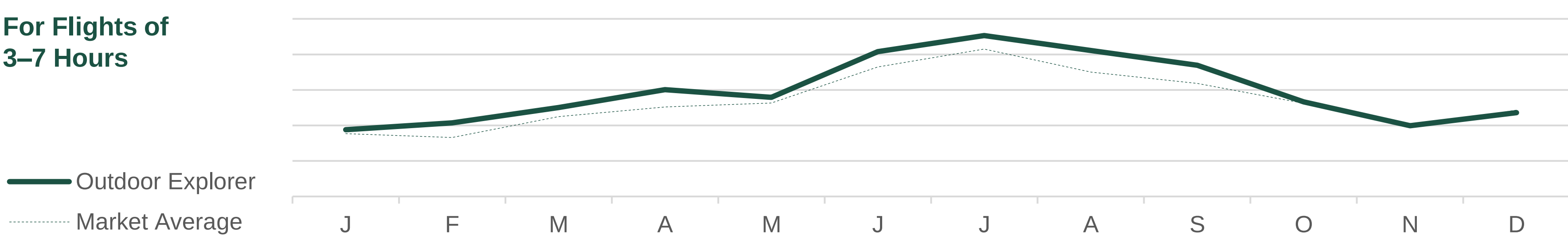
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	47%	100
3-5 Days	35%	114
1 Week Holiday	21%	106
2 Weeks Holiday	11%	107
3 Weeks Or More	8%	115

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	62%	129
International Leisure	13%	106
Business Trip	19%	107
Added Personal To Business	10%	110
Worked During Vacation	10%	106

Incidence is frequency of 2+ times per year

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**52%**	97
Vacation Rental (e.g., Airbnb, Vrbo)	**27%**	122
Friend's or family's place	**23%**	85
Premium Hotel	**23%**	91
Budget Hotel	**12%**	121
Campsite	**10%**	149

THOUGHTS ON INDIGENOUS TRAVEL

57%

113 INDEX SCORE

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

11%

108 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	**80%**	137
You only ever get to know a country by experiencing its culture	**73%**	98
I'm willing to put in the effort while travelling in order to see lesser-known places	**73%**	128
I really want to learn about the history of the destinations I visit	**69%**	101
I'm open to travelling to destinations with limited tourist infrastructure	**61%**	137
I'm open to visiting destinations with challenging climates or weather conditions	**40%**	122

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**61%**	103
Adult relatives	**23%**	90
Solo	**17%**	101
Kids	**16%**	96
Friends	**13%**	101

BUDGET

AVERAGE SPEND SHORT-HAUL

$1,770 89 INDEX SCORE

AVERAGE SPEND MID-HAUL

$4,700 129 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	**52%**	106
I consider the impact that I personally have on the destinations I visit	**52%**	114
It's important to me that I visit somewhere that is open to diversity and inclusion	**40%**	95
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**39%**	119
Hearing from underrepresented communities is an important part of travelling	**38%**	108

43%

PRIORITIZE SUSTAINABLE TRAVEL

111 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.
- Seek adventure through overnight experiences such as staying in a cabin or taking a road trip.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	70%	150
○ Hiking	42%	151
○ Nature walks	39%	148
○ Viewing wildlife in natural habitat	33%	150
High-intensity sports	13%	143
○ Whitewater rafting	4%	145
○ Rock climbing	4%	136
Water-based sports	23%	137
○ Kayaking, canoeing, or paddle-boarding	13%	143
○ Swimming	13%	133
Overnight experiences	26%	117
○ Staying at resort or cabin in nature	12%	140
○ Renting a RV	3%	127
Casual sports	22%	148
○ Casual biking	8%	145
○ Ziplining	4%	151
Winter-based sports	15%	139
Local cuisine	32%	63
Cultural experiences or attractions	46%	85
Shopping	21%	55
Guided tours	29%	103
Family-focused attractions	28%	93
Festivals and events	24%	80

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
For adventure and excitement	**53%**	143	**54%**	142
To relax and unwind	**53%**	81	**46%**	79
To spend time with family	**40%**	84	**42%**	92
To escape from routine	**39%**	82	**33%**	86
To check off dream travel places	**23%**	121	**22%**	109
To have fun with friends	**21%**	80	**25%**	95
To learn through other cultures	**16%**	104	**24%**	103
For personal reflection and growth	**13%**	118	**8%**	98
For a romantic getaway	**12%**	97	**13%**	98

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	**48%**	91	**51%**	101
Visiting friends / family	**44%**	86	**48%**	113
Family / friends wanted to go	**28%**	82	**36%**	103
Special event (e.g., wedding, reunion)	**25%**	78	**28%**	97
Festival or event	**21%**	93	**22%**	92
Kids wanted to go	**13%**	94	**19%**	99

25% 100 INDEX SCORE

Travel aligns with children's school schedule

33% 109 INDEX SCORE

Take time off for vacation during major holidays

21% 103 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.

71%

Primary Trip Planner

118
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 0–3 HOURS / NO FLIGHT		FLIGHT OF 3–7 HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 4.2 Months** ○ Travel booking sites / apps ○ Travel provider websites
Started Researching and Planning – 3.3 months ○ Official tourism websites	**4 MONTHS** BEFORE MY TRIP	
	3 MONTHS BEFORE MY TRIP	**Booked Accommodation – 2.9 months** ○ Direct with company **Booked Transportation – 2.8 months** ○ Direct with company
Booked Accommodation – 2.2 months ○ Travel booking sites / apps **Booked Transportation – 1.8 months** ○ Direct with company **Booked Activities – 1.5 months** ○ Direct with company	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	**Booked Activities – 1.6 months** ○ Direct with company
	MY TRIP BEGINS!	
	DURING MY TRIP	

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

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

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

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

% OF TOTAL TRIPS: 11% — 131 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Adventure Destination		
COMPANIONS	Couple Only		**33%**
TRIP EMOTIONAL MOTIVATIONS	Adventure	Fun	Novel & Authentic
ACTIVITIES	Hiking		**35%**
	Local restaurants		**23%**
	See / explore mountains		**21%**
KEY BEHAVIOURS	Seeking variety of access to adventure, may be a bucket list destination		

% OF TOTAL TRIPS: 7% — 102 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Mountain Retreat		
COMPANIONS	Couple Only		**43%**
	Extended Family		**24%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Adventure	Bonding
ACTIVITIES	Hiking		**41%**
	Local restaurants		**31%**
	Lakes, rivers, or waterfalls		**24%**
KEY BEHAVIOURS	Larger group, staying in vacation rental, most likely to be winter-based		

% OF TOTAL TRIPS: 13% — 143 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple Only		**52%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants		**41%**
	Souvenir shopping		**13%**
	Cafes or bakeries		**11%**
KEY BEHAVIOURS	Relaxing down-time with our partner, visiting friends, less active		

% OF TOTAL TRIPS: 17% — 100 INDEX SCORE

SEGMENT ALIGNMENT: ●●○○○

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban Centre		**28%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Bonding
ACTIVITIES	Local restaurants		**33%**
	Museums		**18%**
	Historical / archeological sites		**11%**
KEY BEHAVIOURS	Planned more last minute, seeking excitement in a trendy city		

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!
- When we go abroad, we are exploring Europe, and Asian countries.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
USA	**63%**	95
Canada	**3%**	109
Mexico	**3%**	73
France	**3%**	102
Italy	**2%**	102

	SCORE	INDEX
UK	**2%**	89
Australia	**2%**	139
Bahamas	**2%**	86
Spain	**1%**	95
Germany	**1%**	94

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	**51%**	147
Provides numerous opportunities for outdoor adventures	**46%**	153
Provide access to unique natural wonders	**44%**	150
Provides opportunities to view wildlife in its natural habitat	**38%**	151
Offers a range of scenic viewpoints	**38%**	149
Offers natural landscapes in close proximity to city amenities	**23%**	133
Offers options for adrenaline seekers	**11%**	148
Provides a remote, no-frills experience	**10%**	137

OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

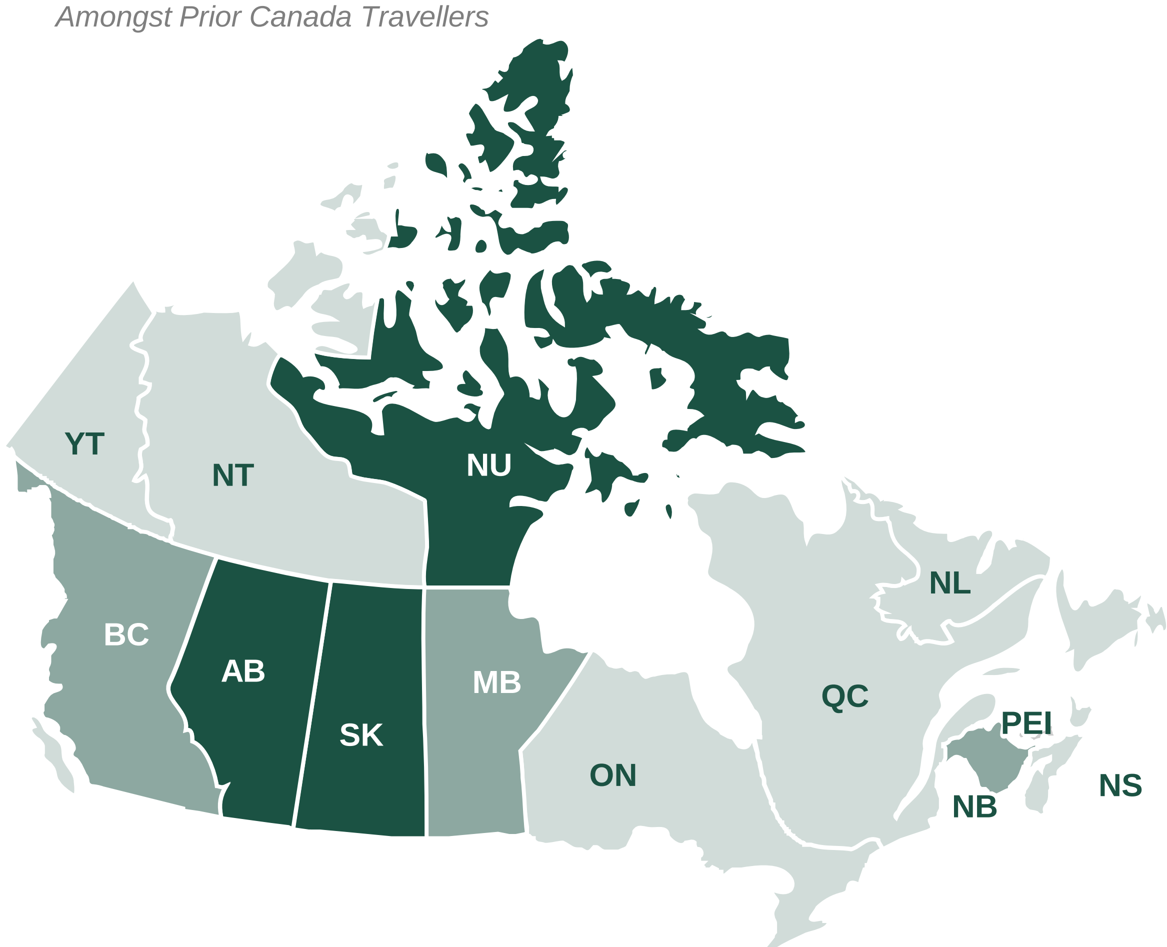
- We have probably been to Canada before, but perhaps not recently.
- We have explored Canada a little, including British Columbia, the Prairies, and the Territories.
- Toronto, Vancouver, Quebec and Atlantic provinces, are on our radar.

WHERE DO WE WANT TO GO IN CANADA

NIAGARA FALLS
HISTORICAL SITES
CANADIAN ENTERTAINMENT
AQUARIUM
PRINCE EDWARD ISLAND
NOVA SCOTIA
CASINO
RED LAKE, ONTARIO
ALBERTA
CHURCHILL
CANADIAN WILDLIFE
RESTAURANTS
OHIO
SASKATCHEWAN
BANFF
VANCOUVER
HOTEL
NEW BRUNSWICK
ISLAND
WHISTLER
MANITOBA
OLIVER
CANADIAN CUISINE
CANADIAN COMPANIES
LAKE LOUISE
VICTORIA
MONTREAL
EDMONTON
TOFINO
BRITISH COLUMBIA
MONT TREMBLANT
CANADIAN EXPERIENCE
NEWFOUNDLAND
HALIFAX
TORONTO
FORT ERIE
OTTAWA
CALGARY
ONTARIO
CHATEAUGUAY
SAULT STE MARIE
QUEBEC

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	24%	142
BC	39%	117
MB	9%	122
NB	10%	115
NL	4%	98
NS	11%	95
NT	5%	113
NU	4%	131
ON	44%	85
PEI	5%	90
QC	25%	73
SK	9%	137
YT	4%	113

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Like many travellers, the majority of our visits occur in the summer, but we are also skiers, so we will come in winter as well.
- We have started researching some destinations in Canada.

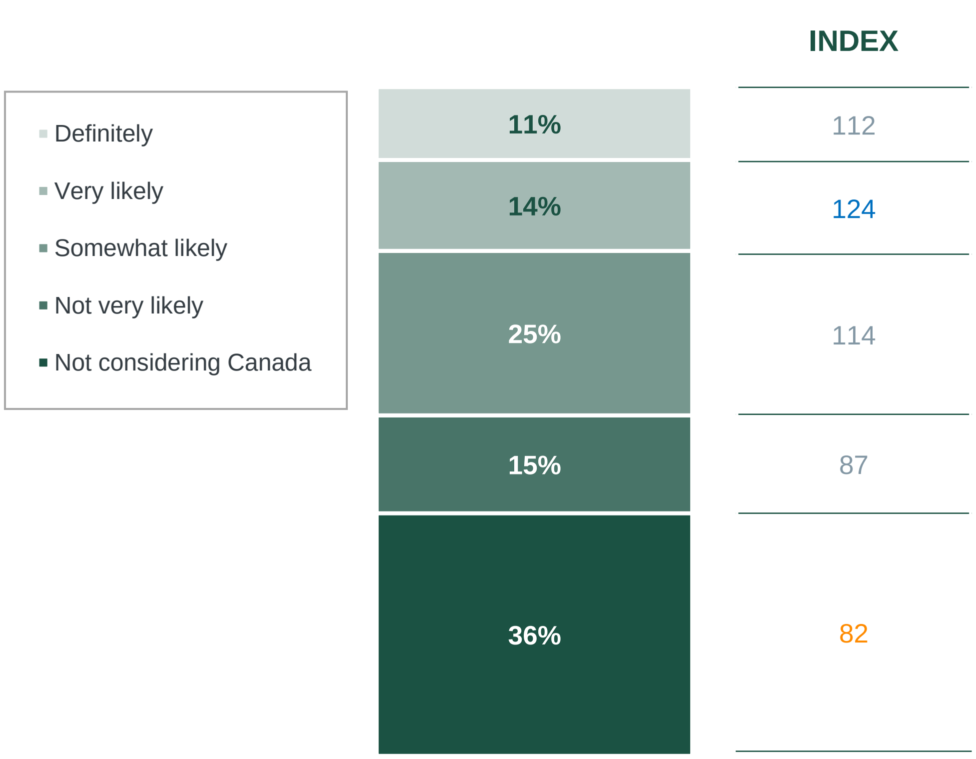
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	**16%**	**25%**	**59%**	**25%**
VS. TOTAL MARKET	14%	24%	58%	25%

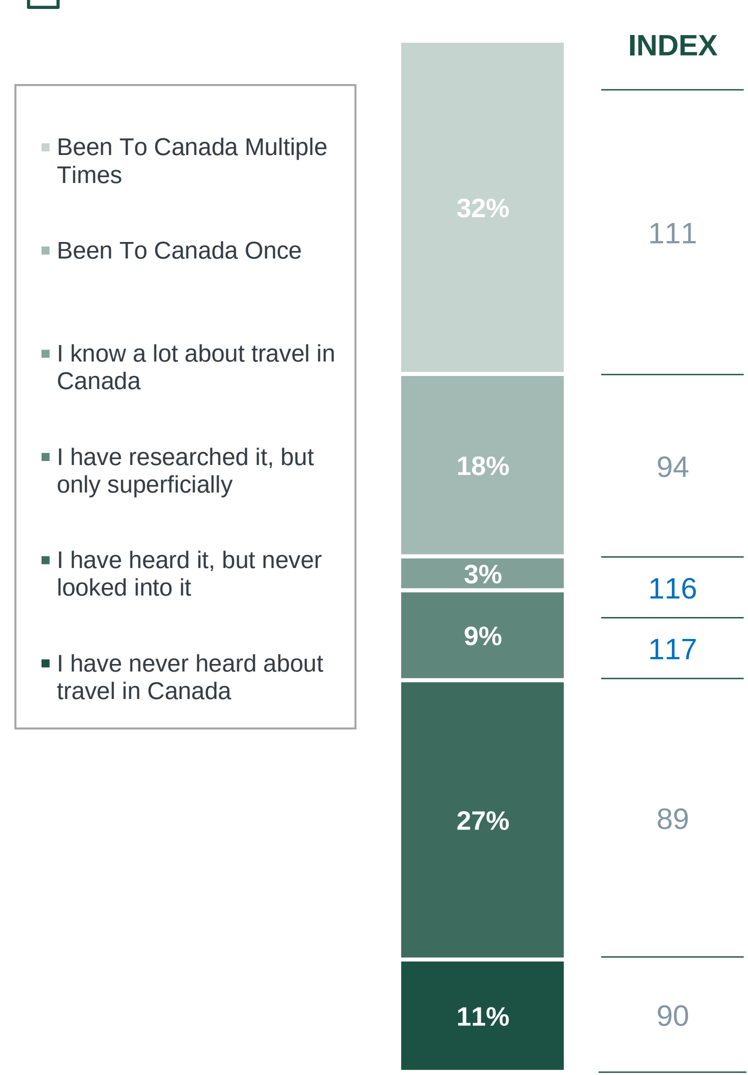
24% Been to Canada in last 5 years

111 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- 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 a little older, and we are just retiring, which may have also sparked a move to a new city or a home renovation.

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%
Had a child
97 INDEX SCORE

27%
Started a new job / career
107 INDEX SCORE

15%
Bought a new home
98 INDEX SCORE

21%
Moved to a new city
134 INDEX SCORE

7%
Child started school
97 INDEX SCORE

42%
Purchased a car
98 INDEX SCORE

12%
Retired
109 INDEX SCORE

20%
Renovated house
107 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	60%	104
Savings and investments	50%	94
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	40%	111
Experiences (e.g., concerts, events).	38%	99
Personal care and wellness	36%	76
Technology and gadgets	22%	122

CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY

11%

27.5M

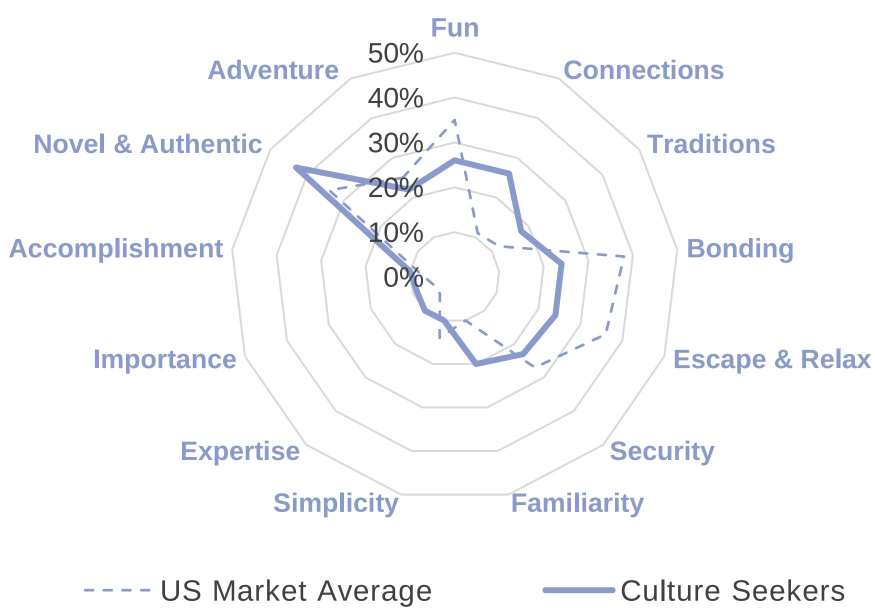
% OF US POPULATION

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

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize diversity, inclusion, sustainability and supporting the local economy.
2. We 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.
4. We take ownership over feeling welcomed in a destination by ensuring we travel responsibly and engage with communities.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

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

122

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 place great value on feeling welcomed and respected.
- Staying flexible and being open to spontaneous experiences is how we get the most out of travel.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	78%	118
Trying out local cuisine is a really important part of travel	77%	120
I am more likely to select destinations / activities that invest in socially responsible tourism	67%	138
I learn the basics of a language before visiting a country / region	59%	132
I go where I want to go, no matter the hurdles	53%	114
I enjoy living in the moment while travelling and don't worry much about what comes next	48%	126
I seek out destinations where I can explore my ancestral heritage	43%	125
I'm open to unconventional accommodations when travelling	41%	123
I like to keep my travel plans flexible and often book on short notice	35%	118
I prefer to explore quickly and cover as much ground as possible at historic sites or museums	33%	134
I'd be open to using AI-powered chatbots for travel planning and assistance	33%	125
I seek out fine dining experiences and gourmet cuisine when I travel	29%	114
I seek travel advice from travel agencies and agents	26%	120

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	42%	122
To open my mind to new perspectives	38%	135
To feel a sense of adventure	26%	93
To feel connected with new people	26%	145
To feel like a local	24%	149
To feel welcomed	21%	126

DESIRED DESTINATION

	SCORE	INDEX
Authentic	49%	128
Accepting	32%	149
Sociable	25%	140
Open	23%	136
Free-Spirited	16%	121
Passionate	15%	124

CULTURE SEEKERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We represent a diverse age range and most of us don't have children.
- More than half of us are employed full-time, while close to one in five of us are retired.
- We are more likely to be found in western states.

80%
118 Have a valid passport

GENDER

61%	129	Male
39%	70	Female
1%	127	Non-binary / Other

AGE

	SCORE	INDEX
18-34	39%	124
35-54	30%	93
55+	31%	89
MEAN YEARS	44.8	86

HH INCOME (CAD)

	SCORE	INDEX
$70K or less	21%	99
>$70K to $275K	67%	108
More than $275K	9%	101
Refused	3%	79

HOUSEHOLD

21%	95	Children <18 Living At Home*
7%	79	Children 18+ Living At Home*
16%	84	Children NOT Living At Home*
62%	117	No Children

** Option is not exclusive*

EMPLOYMENT

	SCORE	INDEX
Employed FT	59%	121
Employed PT	9%	114
Self-employed	5%	107
Retired	19%	89

EDUCATION

	SCORE	INDEX
Primary education or less	0%	116
Secondary education	22%	83
Post-secondary education	78%	116

US STATE BREAKOUT

	SCORE	INDEX
California	16%	133
New York	8%	112
Florida	8%	117
Texas	7%	97
North Carolina	4%	137
Colorado	4%	139
Washington	4%	131
Illinois	4%	96
Pennsylvania	3%	89
Maryland	3%	136
Arizona	3%	93
Nevada	3%	131

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

117

TRAVEL TRADE INDEX: **GROUP**

107

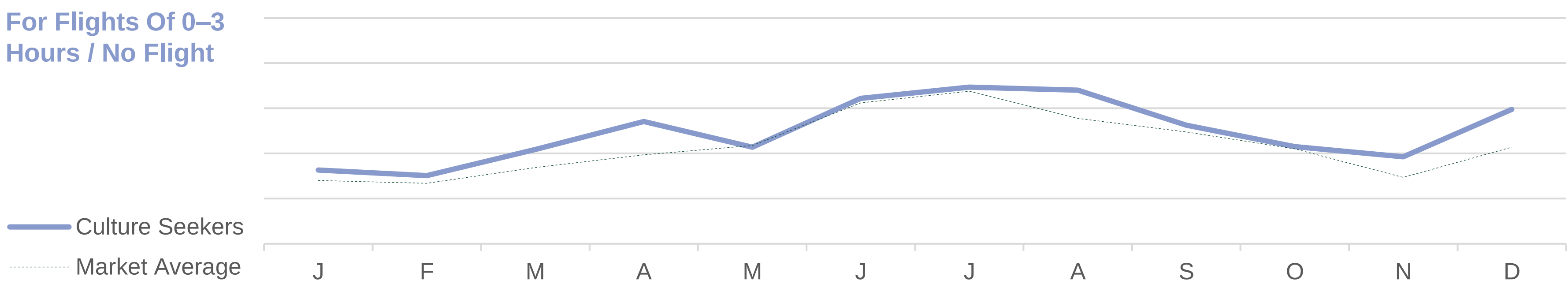
KEY terminology on this page

- **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

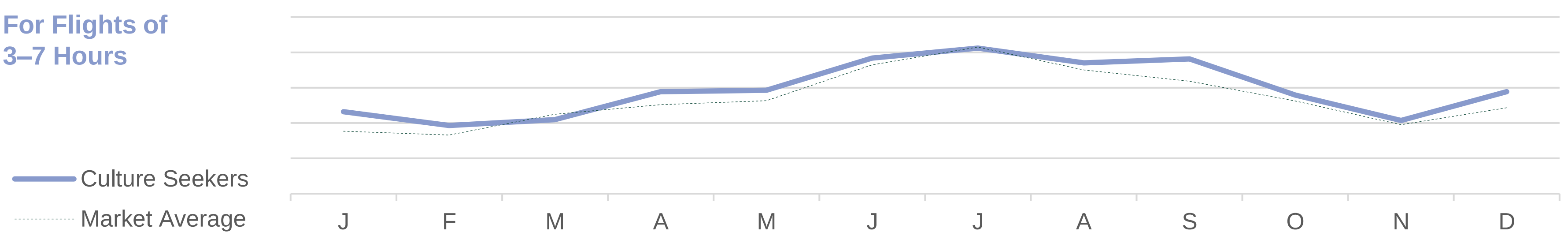
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	47%	103
3-5 Days	38%	126
1 Week Holiday	29%	135
2 Weeks Holiday	20%	142
3 Weeks Or More	13%	142

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	54%	83
International Leisure	22%	133
Business Trip	26%	128
Added Personal To Business	17%	138
Worked During Vacation	17%	137

Incidence is frequency of 2+ times per year

CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	48%	89
Friend's or family's place	26%	97
Premium Hotel	26%	102
Vacation Rental (e.g., Airbnb, Vrbo)	20%	90
Budget Hotel	10%	103
Cruise ship	9%	103

THOUGHTS ON INDIGENOUS TRAVEL

68%

129 INDEX SCORE

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

16%

135 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%	127
You only ever get to know a country by experiencing its culture	77%	113
I like to explore places that are off the beaten path and less explored	68%	119
I'm willing to put in the effort while travelling in order to see lesser-known places	66%	118
I'm open to travelling to destinations with limited tourist infrastructure	56%	124
I'm open to visiting destinations with challenging climates or weather conditions	37%	116

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**43%**	68
Solo	**30%**	144
Adult relatives	**21%**	79
Friends	**13%**	103
Kids	**12%**	93

BUDGET

AVERAGE SPEND SHORT-HAUL

$3,200 121 INDEX SCORE

AVERAGE SPEND MID-HAUL

$3,810 111 INDEX SCORE

SPEND STYLE

Premium / Upscale

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	**74%**	141
It's important for me to know that the money I spend will support the local economy I'm visiting	**66%**	134
I consider the impact that I personally have on the destinations I visit	**63%**	132
Hearing from underrepresented communities is an important part of travelling	**57%**	132
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**45%**	130

58%

PRIORITIZE SUSTAINABLE TRAVEL

131 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.
- Convenience is important; like city tours and street cuisine.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**54%**	109
○ Local restaurants	**46%**	104
○ Cafes or bakeries	**29%**	112
○ Street cuisine	**28%**	122
Cultural experiences or attractions	**61%**	117
○ Museums	**42%**	114
○ Historical or archeological sites	**38%**	116
Festivals and events	**47%**	125
○ Music concerts or festivals	**27%**	115
○ Cultural or traditional festivals	**24%**	148
Nightlife	**20%**	115
○ Bars and pubs	**14%**	117
○ Clubs and dancing	**8%**	112
Health and wellness	**16%**	111
○ Meditation or yoga	**6%**	129
○ Volunteering	**3%**	115
High-intensity sports	**7%**	113
Winter-based sports	**9%**	106
Shopping	**35%**	95
Nature experiences	**34%**	82
Guided tours	**26%**	96
Family-focused attractions	**20%**	84
Casual sports	**15%**	101

CULTURE SEEKERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	47%	70	45%	78
For adventure and excitement	38%	108	33%	95
To spend time with family	38%	80	36%	84
To escape from routine	37%	76	31%	81
To learn through other cultures	30%	135	35%	130
To have fun with friends	26%	97	30%	111
To check off dream travel places	20%	106	24%	123
For personal reflection and growth	16%	132	14%	138
For a romantic getaway	13%	106	13%	95

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Visiting friends / family	46%	99	49%	120
Partner / spouse wanted to go	37%	62	35%	70
Festival or event	34%	131	35%	127
Special event (e.g., wedding, reunion)	34%	112	31%	112
Family / friends wanted to go	32%	93	36%	104
Work dictates destinations	14%	135	17%	136

26% 100 INDEX SCORE

Travel aligns with children's school schedule

39% 123 INDEX SCORE

Take time off for vacation during major holidays

29% 134 INDEX SCORE

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

CULTURE SEEKERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We are generally planning within 3 months of a trip, and using many information resources.

73%

Primary Trip Planner

123
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 **0–3 HOURS / NO FLIGHT**		FLIGHT OF **3–7 HOURS**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	
	4 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 3.5 Months** ○ Travel review sites
Started Researching and Planning – 2.8 months ○ Recommendations from friends or family	**3 MONTHS** BEFORE MY TRIP	**Booked Transportation – 2.3 months** ○ Direct with company **Booked Accommodation – 2.2 months** ○ Direct with company
Booked Accommodation – 1.9 months ○ Direct with company **Booked Transportation – 1.7 months** ○ Direct with company **Booked Activities – 1.3 months** ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	**Booked Activities – 1.6 months** ○ Direct with company
	MY TRIP BEGINS!	
	DURING MY TRIP	

CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips enjoy the culture, food, music, and shopping of a destination.
- We also take trips like Refined Globetrotters 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: 30% — 131 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban Centre		**28%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Bonding
ACTIVITIES	Local restaurants		**33%**
	Museums		**18%**
	Art galleries		**11%**
KEY BEHAVIOURS	Exploration of safe and trendy destinations, not planned too far in advance		

% OF TOTAL TRIPS: 10% — 117 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple Only		**30%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Bonding
ACTIVITIES	Local restaurants		**48%**
	Visiting local monuments		**24%**
	Historical / archeological sites		**23%**
KEY BEHAVIOURS	Authentic experience, immersed in a new culture. Planned well in advance		

% OF TOTAL TRIPS: 6% — 97 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○ (3 of 5)

TRIP TYPE	Historical Site		
COMPANIONS	Couple Only		**61%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Bonding
ACTIVITIES	Historical / archeological sites		**62%**
	Local restaurants		**51%**
	Museums		**51%**
KEY BEHAVIOURS	Discovering new places. Higher budget, could be guided tours or a cruise		

% OF TOTAL TRIPS: 23% — 174 INDEX SCORE

SEGMENT ALIGNMENT: ●●○○○ (2 of 5)

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only		**29%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**52%**
	Cafes or bakeries		**25%**
	Souvenir shopping		**20%**
KEY BEHAVIOURS	Fun with family and friends, visiting restaurants and experiencing nightlife		

CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek rich culture and heritage, with a variety of museums and historical sites.
- While we often travel in North America, we also visit Europe, Latin America and the Caribbean.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
US	**50%**	71
UK	**4%**	131
Canada	**3%**	116
France	**3%**	113
Italy	**3%**	117

	SCORE	INDEX
Spain	**3%**	137
Mexico	**3%**	70
Germany	**2%**	123
Greece	**2%**	132
Belgium	**2%**	146

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**42%**	127
Is inclusive and tolerant	**40%**	153
Has a variety of museums and / or historical sites	**38%**	126
Has many hidden gems	**31%**	131
Provides a variety of local festivals and events	**29%**	140
Has a thriving arts and music scene	**25%**	151
Offers a range of scenic viewpoints	**21%**	77
Offers an energetic and dynamic cultural scene	**21%**	145

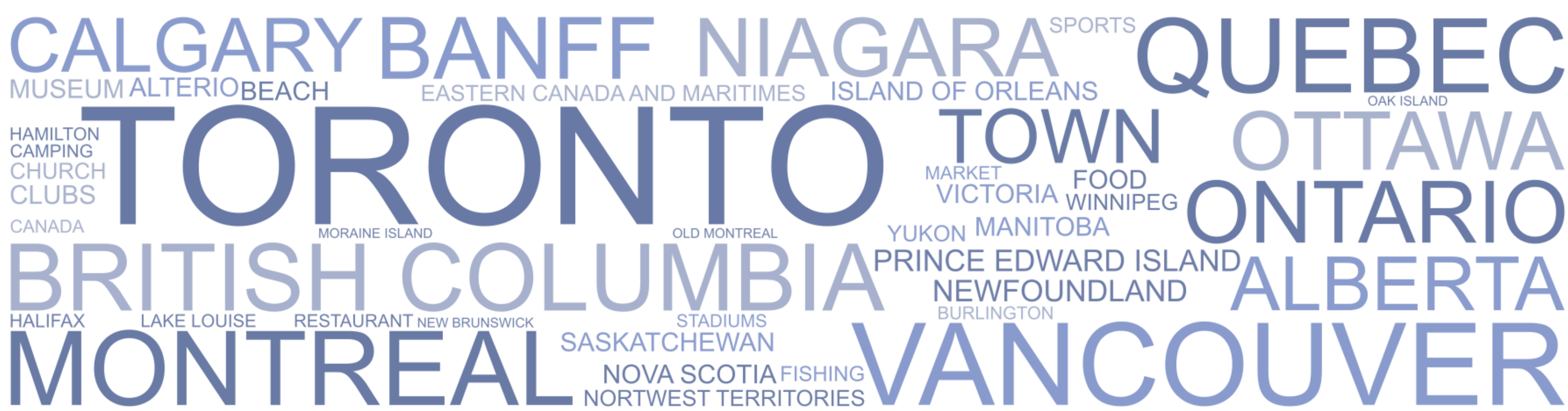
CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

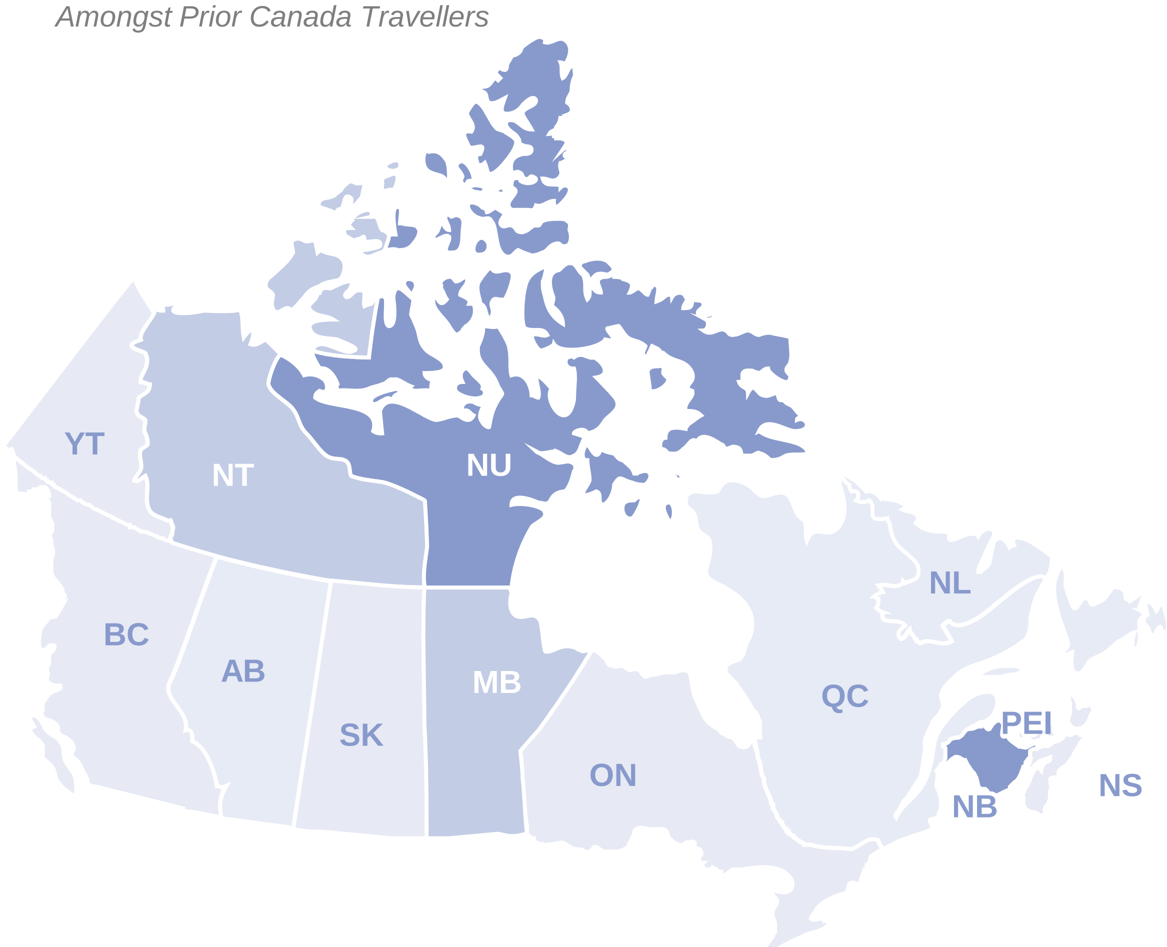
- We have likely visited Canada once or twice, but perhaps not in the past five years.
- We have explored a range of provinces, favouring Ontario, Quebec, and British Columbia, but also ventured into the Prairies, Atlantic provinces, and the Territories.
- We are still open to exploring less-toured provinces and territories.

WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	12%	90
BC	38%	113
MB	10%	123
NB	12%	127
NL	6%	112
NS	11%	98
NT	6%	118
NU	4%	125
ON	40%	64
PEI	7%	102
QC	29%	99
SK	3%	87
YT	2%	83

CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- We have travelled to Canada during the summer months, but there is potential for travel during winter and spring.
- A number of us are likely to return to Canada within the next couple of years, especially those who have visited before.
- We feel fairly familiar with Canada.

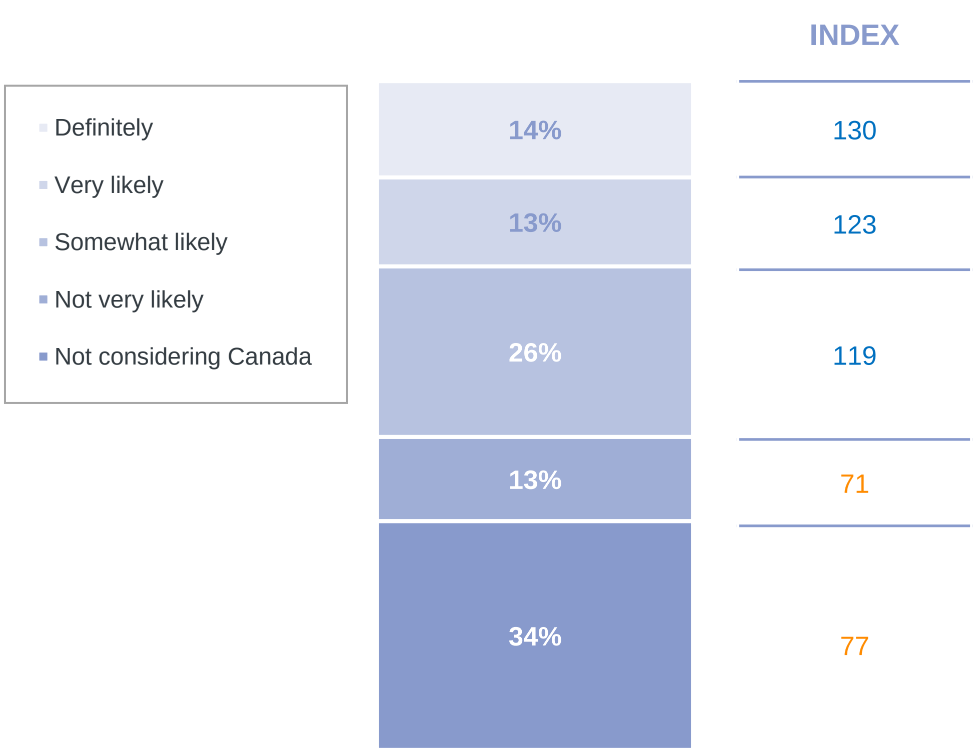
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CULTURE SEEKERS	**23%**	**30%**	**49%**	**25%**
VS. TOTAL MARKET	14%	24%	58%	25%

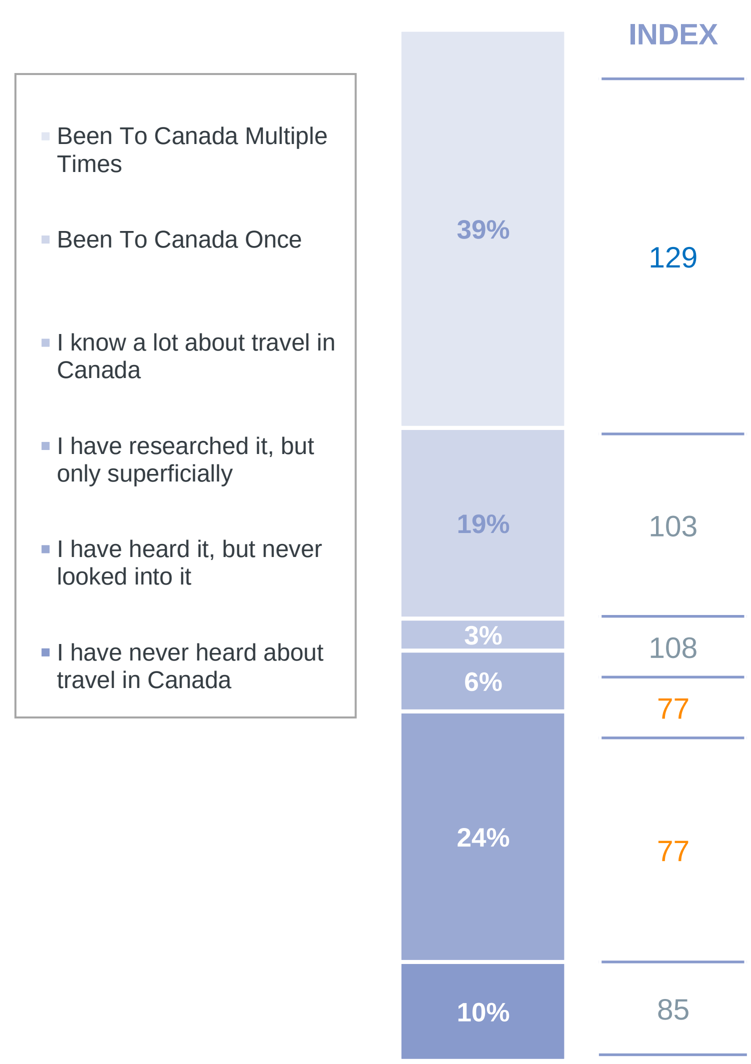
32% Been to Canada in last 5 years

134 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 may have purchased a car, changed jobs, or moved to a new city.

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%
Had a child
96 INDEX SCORE

28%
Started a new job / career
112 INDEX SCORE

12%
Bought a new home
80 INDEX SCORE

19%
Moved to a new city
115 INDEX SCORE

5%
Child started school
94 INDEX SCORE

42%
Purchased a car
97 INDEX SCORE

7%
Retired
84 INDEX SCORE

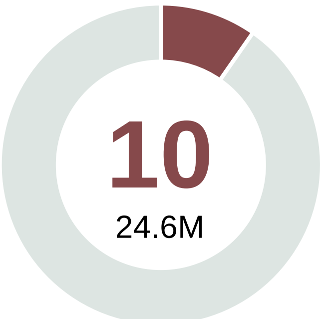
19%
Renovated house
101 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**57%**	97
Savings and investments	**49%**	89
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**41%**	113
Experiences (e.g., concerts, events).	**39%**	104
Personal care and wellness	**37%**	85
Technology and gadgets	**23%**	128

REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



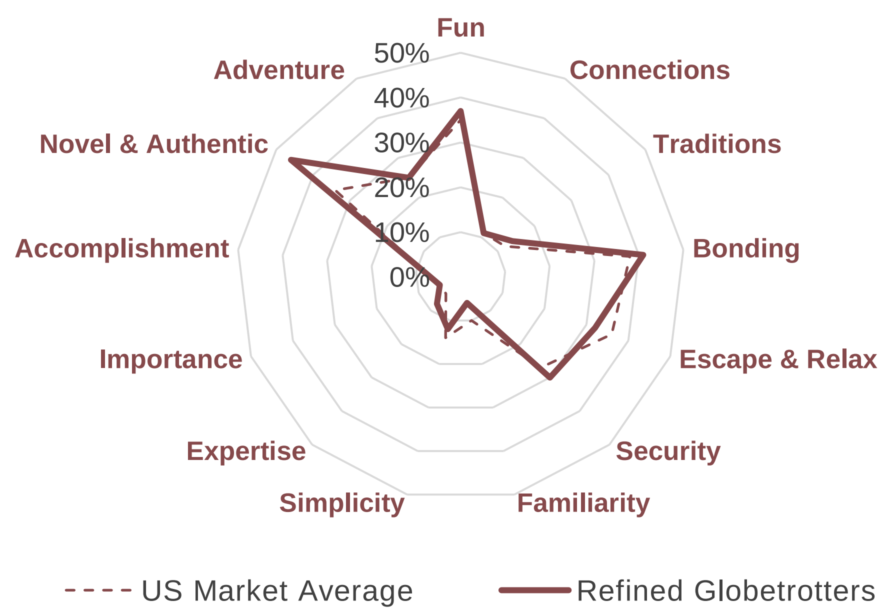
% OF US POPULATION

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. Planning how we will see the history, museums, and architecture of a destination is paramount.
4. We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.

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 in authentic, charming, new places.
- 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
Exploring the world through travel is an important milestone of growing up	86%	126
I'm always on the look out for new destinations to visit next	83%	124
I prefer booking flights and accommodations well in advance	82%	127
I'm passionate about travelling	81%	121
I tend to not think about my budget too much when travelling	71%	146
I make sure to visit the "famous" sites wherever I go	67%	138
I'm a planner, while travelling I like to know what comes next	67%	136
I prefer destinations with well-established tourist infrastructure	62%	125
Luxury experiences are an important part of travel	59%	145
I enjoy joining guided tours to explore new destinations	47%	136
I seek out fine dining experiences and gourmet cuisine when I travel	39%	137
When traveling, I expect 24 / 7 support from a travel provider	29%	138
I seek travel advice from travel agencies and agents	28%	127

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	61%	134
To have authentic experiences	48%	134
To open my mind to new perspectives	29%	116
To indulge myself and live in the moment	38%	120
To feel welcomed	20%	119
To feel like a travel expert	8%	116

DESIRED DESTINATION

	SCORE	INDEX
Authentic	49%	128
Luxurious	41%	156
Unique	39%	122
Charming	34%	146
World-Class	24%	154
Exclusive	18%	151

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, and our travel plans don't often include them.

AGE

	SCORE	INDEX
18-34	**21%**	88
35-54	**30%**	93
55+	**49%**	112
MEAN YEARS	**52.5**	113

HH INCOME (CAD)

	SCORE	INDEX
$70K or less	**10%**	53
>$70K to $275K	**70%**	131
More than $275K	**16%**	147
Refused	**4%**	107

EMPLOYMENT

	SCORE	INDEX
Employed FT	**49%**	95
Employed PT	**7%**	82
Self-employed	**6%**	116
Retired	**31%**	112

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	84
Secondary education	**17%**	63
Post-secondary education	**84%**	137

87%
134 Have a valid passport

GENDER

52% 100 Male

48% 101 Female

0% 64 Non-binary / Other

HOUSEHOLD

18% 93 Children <18 Living At Home*

8% 109 Children 18+ Living At Home*

31% 110 Children NOT Living At Home*

51% 104 No Children

** Option is not exclusive*

US STATE BREAKOUT

	SCORE	INDEX
California	**15%**	129
New York	**10%**	128
Texas	**9%**	127
Florida	**7%**	93
Illinois	**5%**	133
New Jersey	**4%**	135

	SCORE	INDEX
Pennsylvania	**4%**	96
North Carolina	**3%**	97
Tennessee	**3%**	121
Virginia	**3%**	108
Massachusetts	**2%**	109
Michigan	**2%**	90

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

131

TRAVEL TRADE INDEX: **GROUP**

131

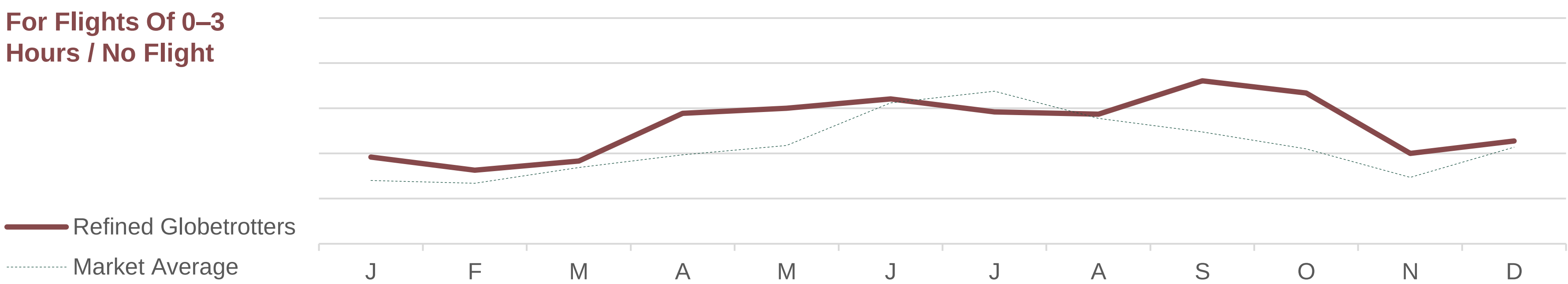
KEY terminology on this page

- **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

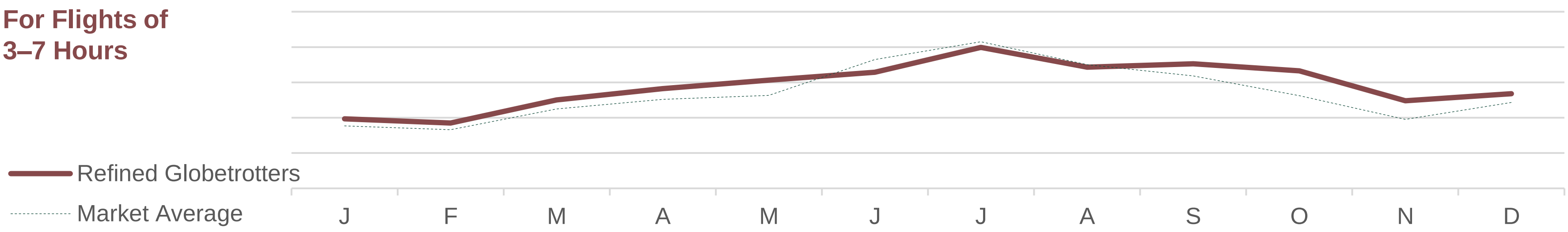
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	53%	131
3-5 Days	35%	115
1 Week Holiday	25%	121
2 Weeks Holiday	11%	105
3 Weeks Or More	6%	101

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	59%	116
International Leisure	19%	125
Business Trip	20%	112
Added Personal To Business	11%	111
Worked During Vacation	11%	111

Incidence is frequency of 2+ times per year

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Premium Hotel	45%	155
Mid-priced Hotel	37%	59
Cruise ship	18%	152
Friend's or family's place	17%	61
Vacation Rental (e.g., Airbnb, Vrbo)	16%	76
All-inclusive resort	16%	151

THOUGHTS ON INDIGENOUS TRAVEL

57%

112 INDEX SCORE

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

13%

117 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	85%	133
You only ever get to know a country by experiencing its culture	85%	139
I'm willing to put in the effort while travelling in order to see lesser-known places	62%	111
I like to explore places that are off the beaten path and less explored	49%	91
I'm open to travelling to destinations with limited tourist infrastructure	38%	75
I'm open to visiting destinations with challenging climates or weather conditions	27%	97

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	71%	125
Adult relatives	20%	76
Kids	13%	94
Friends	11%	93
Solo	11%	83

BUDGET

AVERAGE SPEND SHORT-HAUL

$3,790 134 INDEX SCORE

AVERAGE SPEND MID-HAUL

$3,840 111 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	54%	110
It's important to me that I visit somewhere that is open to diversity and inclusion	44%	100
I consider the impact that I personally have on the destinations I visit	41%	96
Hearing from underrepresented communities is an important part of travelling	31%	99
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	26%	93

33%

PRIORITIZE SUSTAINABLE TRAVEL

98 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, which may be done through guided tours.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	69%	138
○ Local restaurants	61%	138
○ Cafes or bakeries	37%	137
○ Luxury dining	33%	153
Shopping	41%	111
○ Souvenir shopping	22%	104
○ Luxury shopping	17%	145
Cultural experiences or attractions	72%	141
○ Museums	51%	141
○ Historical or archeological sites	50%	145
Guided tours	47%	148
○ City tours	38%	151
○ Boat tours	19%	154
Health and wellness	20%	135
○ Spas	15%	152
○ Sauna or steam bath	7%	131
Nature experiences	41%	96
Family-focused attractions	26%	90
Nightlife	12%	89
Festivals and events	25%	82
Overnight experiences	30%	137
Water-based sports	8%	80
Casual sports	10%	69

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF **0–3 HOURS / NO FLIGHT**		TRIPS OF FLIGHTS OF **3–7 HOURS**	
	SCORE	**INDEX**	**SCORE**	**INDEX**
To relax and unwind	**56%**	88	**61%**	108
To spend time with family	**46%**	92	**42%**	93
To escape from routine	**44%**	96	**42%**	109
For adventure and excitement	**31%**	93	**28%**	83
To learn through other cultures	**25%**	125	**29%**	115
To check off dream travel places	**25%**	126	**23%**	113
To have fun with friends	**20%**	77	**15%**	60
For a romantic getaway	**14%**	120	**16%**	124
To be pampered	**11%**	141	**14%**	142

EXTERNAL TRIP TRIGGERS

	SCORE	**INDEX**	**SCORE**	**INDEX**
Partner / spouse wanted to go	**62%**	127	**61%**	120
Visiting friends / family	**43%**	81	**40%**	73
Special event (e.g., wedding, reunion)	**33%**	110	**29%**	101
Family / friends wanted to go	**28%**	82	**30%**	84
Festival or event	**18%**	83	**22%**	92
Kids wanted to go	**12%**	93	**12%**	93

19% 93 INDEX SCORE

Travel aligns with children's school schedule

30% 100 INDEX SCORE

Take time off for vacation during major holidays

13% 70 INDEX SCORE

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

REFINED GLOBETROTTERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We start planning on average 3 months in advance, even for shorter distance trips.

66%

Primary Trip Planner

106
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 0–3 HOURS / NO FLIGHT

Started Researching and Planning – 3.8 months
- Recommendations from friends or family

Booked Accommodation – 2.8 months
- Direct with company

Booked Transportation – 2.7 months
- Direct with company

Booked Activities – 2.1 months
- Direct with company

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 4.9 Months
- Travel provider websites

Booked Accommodation – 3.5 months
- Direct with company

Booked Transportation – 3.3 months
- Direct with company

Booked Activities – 1.9 months
- Direct with company

Timeline

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 cities, visit spas, or see many places via a cruise.
- We sometimes take 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

51% 149 INDEX SCORE

SEGMENT ALIGNMENT

●●●●●

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban Centre		**17%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants		**54%**
	Museums		**27%**
	Souvenir shopping		**21%**
KEY BEHAVIOURS	Mid-range budget, most likely to be a romantic getaway		

% OF TOTAL TRIPS

8% 107 INDEX SCORE

SEGMENT ALIGNMENT

●●●●●

TRIP TYPE	Luxury Resort		
COMPANIONS	Couple Only		**49%**
	Extended Family		**22%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Luxury dining		**44%**
	Spas		**33%**
	Luxury shopping		**28%**
KEY BEHAVIOURS	Luxury trip focussed on indulgence and upscale amenities. Planned in advance		

% OF TOTAL TRIPS

9% 111 INDEX SCORE

SEGMENT ALIGNMENT

●●●●●

TRIP TYPE	Historical Site		
COMPANIONS	Couple Only		**62%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Bonding
ACTIVITIES	Historical / archeological sites		**62%**
	Local restaurants		**51%**
	City tours		**30%**
KEY BEHAVIOURS	Bucket list destination, may be a cruise		

% OF TOTAL TRIPS

18% 156 INDEX SCORE

SEGMENT ALIGNMENT

●●●○○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only		**29%**
	Extended Family		**23%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**52%**
	Bars and pubs		**30%**
	Famous shopping centres / areas		**19%**
KEY BEHAVIOURS	Trip with extended family, lower budget, exploring nightlife and shopping		

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

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

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
USA	**51%**	73	Canada	**4%**	137
Mexico	**5%**	139	Germany	**3%**	137
France	**5%**	139	Spain	**3%**	126
UK	**4%**	132	Greece	**2%**	132
Italy	**4%**	139	Bahamas	**2%**	119

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**47%**	135
Has a variety of museums and / or historical sites	**45%**	144
Renowned for food and drink experiences	**41%**	138
Has famous attractions	**35%**	136
Known for stunning natural landscapes	**34%**	113
Has luxury dining, shopping, and accommodations	**29%**	147
Has well-developed tourism infrastructure	**20%**	146
Offers all-inclusive resort packages	**18%**	147

REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

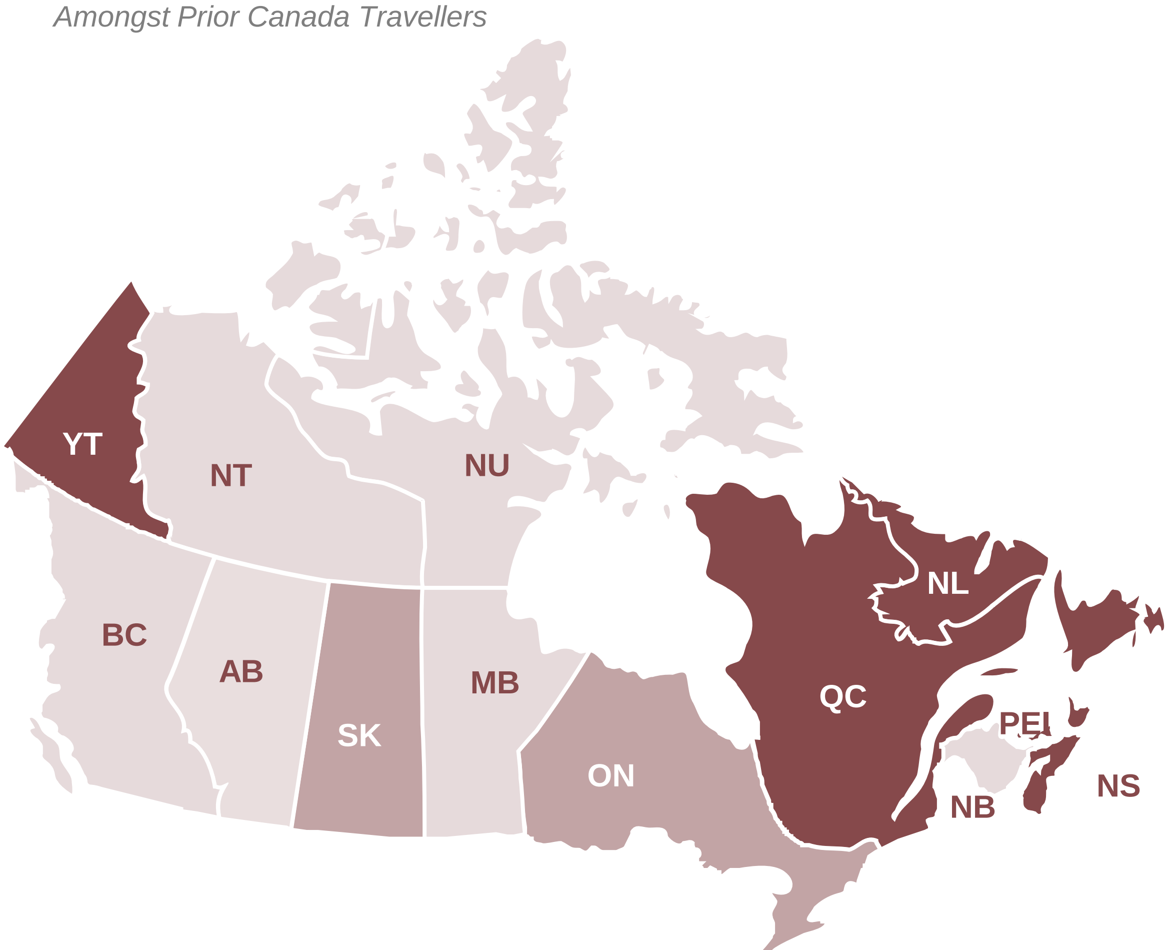
OVERALL INSIGHT

- We have been to Canada before, but perhaps not recently.
- We are most likely to have visited Ontario and British Columbia, and overindex for travel to Quebec and most Maritime provinces.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	16%	107
BC	38%	114
MB	7%	104
NB	8%	100
NL	8%	132
NS	18%	137
NT	3%	89
NU	0%	75
ON	49%	118
PEI	12%	142
QC	36%	138
SK	7%	121
YT	5%	125

DESTINATION CANADA

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 as a travel destination.
- We overindex for Fall Travel to Canada.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	**13%**	**27%**	**56%**	**30%**
VS. TOTAL MARKET	14%	24%	58%	25%

27% Been to Canada in last 5 years

119 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

	%	INDEX
Definitely	10%	110
Very likely	11%	111
Somewhat likely	23%	106
Not very likely	14%	85
Not considering Canada	41%	93

FAMILIARITY WITH CANADA

	%	INDEX
Been To Canada Multiple Times	37%	123
Been To Canada Once	21%	132
I know a lot about travel in Canada	3%	116
I have researched it, but only superficially	9%	122
I have heard it, but never looked into it	23%	70
I have never heard about travel in Canada	7%	77

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 homes, renovations, or vehicles) – and, of course, travel.
- If still working, we are established and stable in our career; we are not changing jobs.

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%
Had a child
95 INDEX SCORE

21%
Started a new job / career
87 INDEX SCORE

18%
Bought a new home
113 INDEX SCORE

15%
Moved to a new city
82 INDEX SCORE

4%
Child started school
91 INDEX SCORE

46%
Purchased a car
120 INDEX SCORE

10%
Retired
102 INDEX SCORE

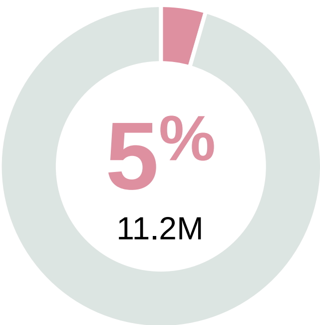
21%
Renovated house
110 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**76%**	148
Savings and investments	**51%**	101
Personal care and wellness	**38%**	92
Experiences (e.g., concerts, events).	**34%**	85
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**27%**	53
Fashion and accessories	**24%**	128

PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



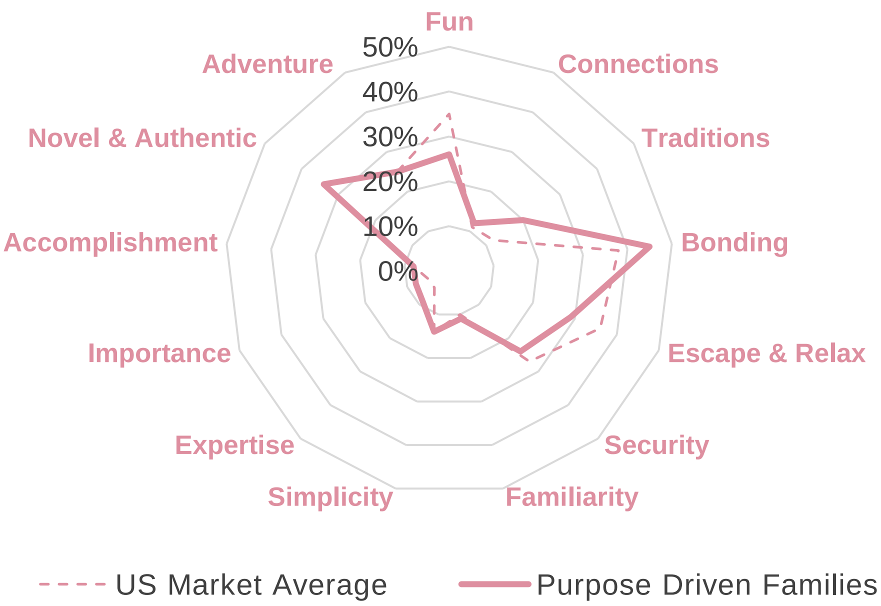
% OF US POPULATION

We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish trendy destinations and hidden gems that support local cultures. 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. Travel is important intrinsically, because we value being able to provide these experiences to our children.
4. Travel is also important extrinsically, since we work hard to be able to take the trips we do, and it demonstrates our success.

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

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

PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We value learning, engaging with local cultures, and exploring our heritage when we travel.
- We use travel to bond and create creating 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
I like to come back from travels having learnt something new	83%	126
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	75%	123
I learn the basics of a language before visiting a country / region	61%	134
I go where I want to go, no matter the hurdles	58%	123
Videos and pictures on social media inspire me to travel	57%	134
I love posting my trips on social media to share with friends	52%	126
I seek out destinations where I can explore my ancestral heritage	51%	140
Luxury experiences are an important part of travel	46%	125
When there's a lot of positive buzz about a destination it makes me want to visit it more	45%	135
Even while travelling, I like to maintain regular contact with my duties or obligations back home	45%	149
I like to keep my travel plans flexible and often book on short notice	39%	128
I'd be open to using AI-powered chatbots for travel planning and assistance	35%	131
I seek travel advice from travel agencies and agents	30%	131

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	50%	111
To bond through shared experiences	40%	122
To create new, or take part in old, traditions	20%	142
To push my limits and challenge myself	10%	121
To feel like a travel expert	9%	121
To feel like I'm important	8%	127

DESIRED DESTINATION

	SCORE	INDEX
Unique	37%	118
Adventurous	36%	111
Open	22%	132
Passionate	20%	146
Free-Spirited	16%	125
Caring	15%	138

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.

AGE

	SCORE	INDEX
18-34	46%	137
35-54	48%	131
55+	7%	59
MEAN YEARS	38.0	61

HH INCOME (CAD)

	SCORE	INDEX
$70K or less	17%	85
>$70K to $275K	69%	122
More than $275K	11%	115
Refused	3%	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	68%	142
Employed PT	9%	105
Self-employed	7%	144
Retired	4%	62

EDUCATION

	SCORE	INDEX
Primary education or less	0%	84
Secondary education	21%	79
Post-secondary education	79%	121

73% 103 Have a valid passport

GENDER

50% 93 Male

50% 107 Female

1% 100 Non-binary / Other

HOUSEHOLD

85% 145 Children <18 Living At Home*

6% 69 Children 18+ Living At Home*

3% 61 Children NOT Living At Home*

12% 59 No Children

** Option is not exclusive*

US STATE BREAKOUT

	SCORE	INDEX
California	11%	91
Florida	9%	127
Texas	9%	119
New York	6%	78
South Carolina	5%	155
Ohio	4%	132

	SCORE	INDEX
Pennsylvania	4%	102
Georgia	4%	108
Illinois	4%	75
Virginia	4%	132
New Jersey	3%	108
Arizona	3%	90

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

128

TRAVEL TRADE INDEX: **GROUP**

125

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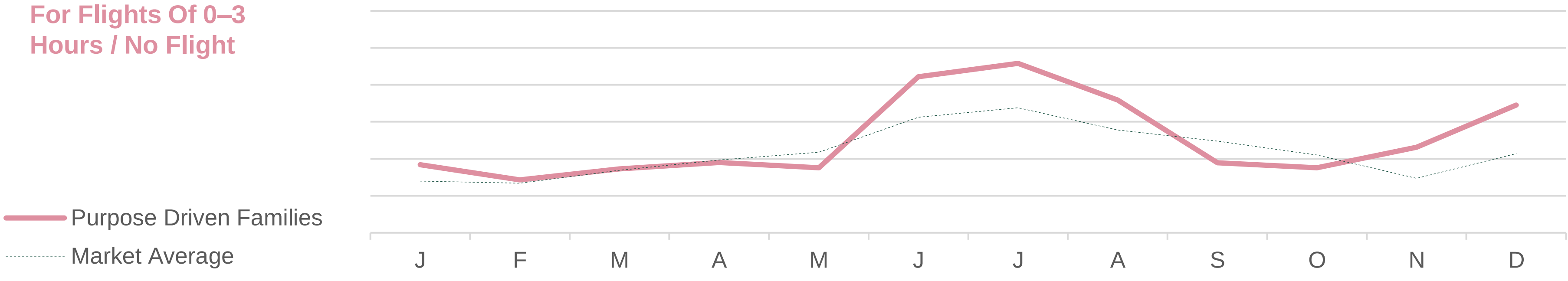
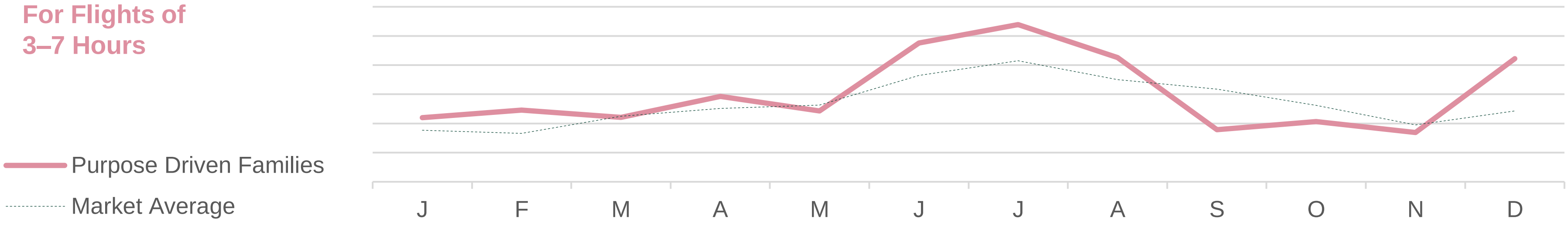


For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	52%	128
3-5 Days	35%	115
1 Week Holiday	19%	100
2 Weeks Holiday	13%	113
3 Weeks Or More	7%	110

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	59%	113
International Leisure	14%	108
Business Trip	28%	133
Added Personal To Business	12%	116
Worked During Vacation	14%	122

Incidence is frequency of 2+ times per year

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**44%**	78
Vacation Rental (e.g., Airbnb, Vrbo)	**27%**	121
Premium Hotel	**25%**	97
Friend's or family's place	**23%**	83
All-inclusive resort	**11%**	115
Budget Hotel	**10%**	102

THOUGHTS ON INDIGENOUS TRAVEL

65%

125 INDEX SCORE

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

12%

112 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	**75%**	112
You only ever get to know a country by experiencing its culture	**74%**	102
I like to explore places that are off the beaten path and less explored	**65%**	116
I'm willing to put in the effort while travelling in order to see lesser-known places	**65%**	116
I'm open to travelling to destinations with limited tourist infrastructure	**49%**	106
I'm open to visiting destinations with challenging climates or weather conditions	**48%**	137

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	71%	125
Kids	63%	138
Adult relatives	23%	90
Solo	9%	79
Friends	7%	67

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,080

108
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	66%	130
I consider the impact that I personally have on the destinations I visit	63%	132
It's important for me to know that the money I spend will support the local economy I'm visiting	59%	121
Hearing from underrepresented communities is an important part of travelling	59%	135
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	46%	132

63%

PRIORITIZE SUSTAINABLE TRAVEL

138 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 explore and expose our kids to local culture and arts.
- Water and winter sports keep the family active.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	62%	127
○ Amusement parks or theme parks	45%	128
○ Zoos or aquariums	47%	128
○ Space or science centres	28%	139
Cultural experiences or attractions	50%	94
○ Museums	38%	102
○ Art galleries	19%	107
Water-based sports	23%	136
○ Swimming	14%	140
○ Waterskiing, wakesurfing or wakeboarding	2%	107
Overnight experiences	25%	112
○ Cruise	10%	95
○ Staying at bed & breakfast	4%	79
Health and wellness	19%	131
○ Outdoor hot tub or bath	6%	97
○ Meditation or yoga	7%	140
Local cuisine	47%	93
Shopping	36%	99
Nature experiences	40%	94
Festivals and events	36%	103
Guided tours	23%	88
Nightlife	13%	93
Winter-based sports	13%	130

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	69%	123	70%	132
To relax and unwind	52%	79	42%	71
To escape from routine	34%	69	24%	65
For adventure and excitement	31%	91	41%	114
To have fun with friends	24%	91	23%	86
To learn through other cultures	21%	115	25%	106
For personal reflection and growth	14%	125	6%	83
To have memories from top travel spots	14%	137	13%	111
For a romantic getaway	11%	87	18%	147

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	62%	139	69%	145
Partner / spouse wanted to go	58%	115	73%	142
Visiting friends / family	44%	91	42%	86
Family / friends wanted to go	43%	120	45%	133
Special event (e.g., wedding, reunion)	41%	142	36%	145
Festival or event	23%	98	30%	115

58% 138 INDEX SCORE

Travel aligns with children's school schedule

45% 139 INDEX SCORE

Take time off for vacation during major holidays

29% 133 INDEX SCORE

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

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We are busy parents, so do not always plan all components of a trip in advance, especially for shorter distance trips. Mid-haul trips are generally booked a couple months out.

73%

Primary Trip Planner

123
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 0–3 HOURS / NO FLIGHT	TIMELINE	FLIGHT OF 3–7 HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	
Started Researching and Planning – 3.1 months ○ Travel booking sites / apps **Booked Accommodation – 2.5 months** ○ Travel booking sites / apps	**4 MONTHS** BEFORE MY TRIP	**Started Researching and Planning – 2.9 Months** ○ Travel review sites **Booked Transportation – 2.5 months** ○ Direct with company **Booked Accommodation – 2.4 months** ○ Travel booking sites / apps
	3 MONTHS BEFORE MY TRIP	
Booked Transportation – 1.9 months ○ Travel booking sites / apps **Booked Activities – 1.6 months** ○ Direct with company	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 1.8 months** ○ Direct with company
	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 couples trips like Culture Seekers.

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

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

% OF TOTAL TRIPS

8% 110 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Adventure Destination		
COMPANIONS	Nuclear Family With Kids		**40%**
	Extended Family		**34%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Novel & Authentic	Adventure
ACTIVITIES	Amusement parks / theme parks		**44%**
	Souvenir shopping		**36%**
	Sporting events		**16%**
KEY BEHAVIOURS	Exploring, seeing and doing new things as a family. Getting outside		

% OF TOTAL TRIPS

15% 152 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Urban Centre		
COMPANIONS	Nuclear Family With Kids		**46%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Novel & Authentic	Escape & Relax
ACTIVITIES	Local restaurants		**44%**
	Museums		**35%**
	Famous shopping centres / areas		**30%**
KEY BEHAVIOURS	Visiting famous and trendy attractions		

% OF TOTAL TRIPS

9% 116 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple Only		**30%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Bonding
ACTIVITIES	Street cuisine		**31%**
	Museums		**31%**
	City tours		**18%**
KEY BEHAVIOURS	Planned in advance, spending more, visiting friends, and exploring a new culture		

% OF TOTAL TRIPS

15% 152 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Urban Centre		
COMPANIONS	Alone		**38%**
	Couple Only		**26%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants		**49%**
	Museums		**29%**
	Bars and pubs		**18%**
KEY BEHAVIOURS	Planned in advance, spending more, visiting friends, and exploring a new culture		

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We are looking for unique hidden gems alongside trendy spots.
- Most of our travel is in North and Central America, but we venture further to Europe or Asia Pacific countries for the bigger trips.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
US	**64%**	98
Mexico	**4%**	109
UK	**3%**	111
Canada	**3%**	107
Bahamas	**3%**	143
Italy	**3%**	106
France	**2%**	98
Germany	**2%**	106
Jamaica	**1%**	157
Japan	**1%**	104

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	**78%**	144
Has a rich cultural and historical heritage	**34%**	113
Has many hidden gems	**29%**	122
Provides a variety of local festivals and events	**22%**	121
Has luxury dining, shopping, and accommodations	**18%**	114
Offers an eccentric and unique atmosphere	**14%**	120
Is a trendy destination	**14%**	144
Has packaged holiday / vacation offers	**12%**	134

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

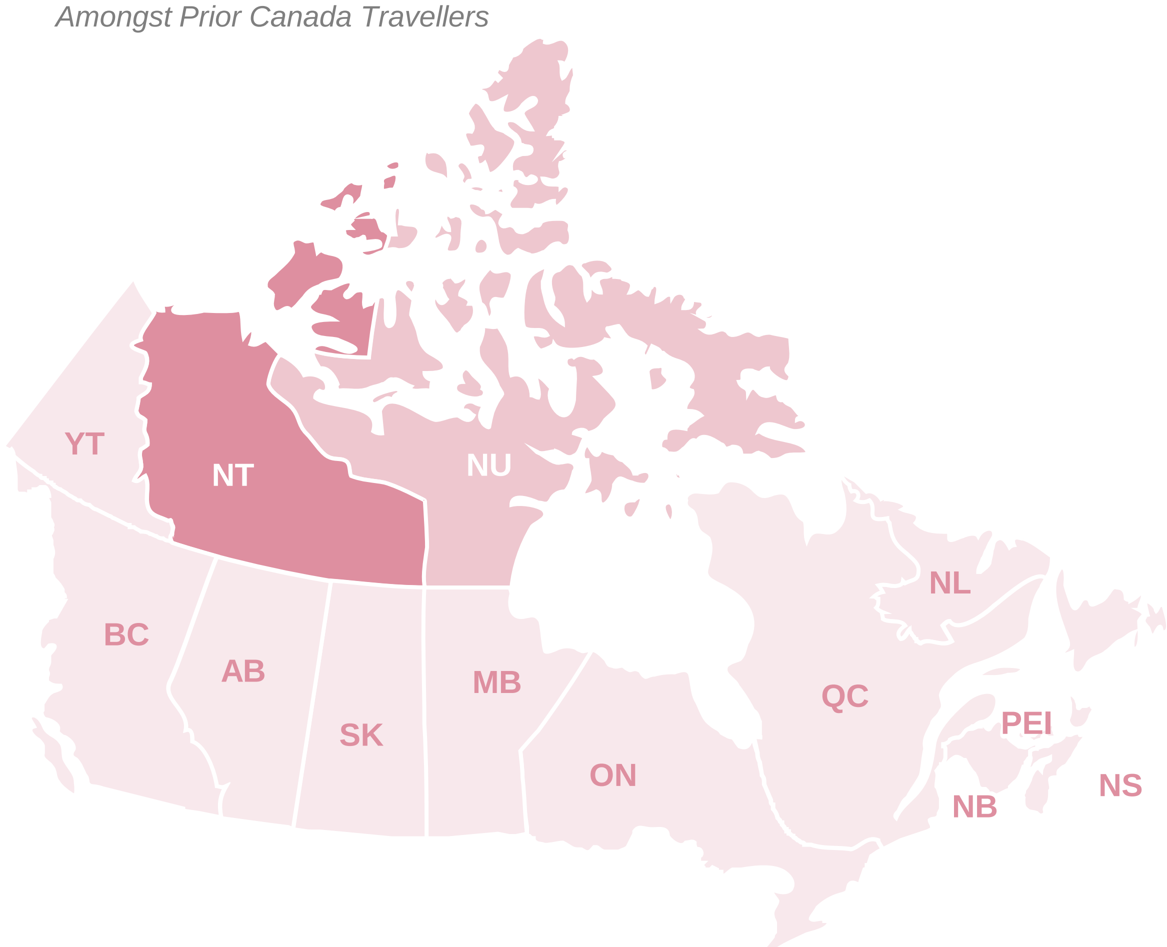
OVERALL INSIGHT

- While many of us haven't visited Canada yet, those of us who have, are often repeat visitors.
- We have explored the big cities in Ontario and Quebec, Niagara, and some mountain towns.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	14%	99
BC	26%	63
MB	3%	70
NB	4%	78
NL	0%	57
NS	11%	99
NT	8%	136
NU	3%	119
ON	47%	105
PEI	4%	85
QC	32%	113
SK	3%	85
YT	1%	62

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- We visit Canada in winter and summer months, aligned with the school calendar.
- Among those of us who haven't been, we are very interested to visit soon.
- Our familiarity with Canada is generally limited to the well-known destinations.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	**18%**	**18%**	**58%**	**21%**
VS. TOTAL MARKET	14%	24%	58%	25%

22% Been to Canada in last 5 years

103 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

	%	INDEX
Definitely	13%	125
Very likely	14%	125
Somewhat likely	21%	94
Not very likely	17%	105
Not considering Canada	35%	79

FAMILIARITY WITH CANADA

	%	INDEX
Been To Canada Multiple Times	23%	85
Been To Canada Once	16%	80
I know a lot about travel in Canada	4%	124
I have researched it, but only superficially	10%	133
I have heard it, but never looked into it	30%	104
I have never heard about travel in Canada	17%	111

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

23%
Had a child
136 INDEX SCORE

31%
Started a new job / career
124 INDEX SCORE

23%
Bought a new home
141 INDEX SCORE

16%
Moved to a new city
97 INDEX SCORE

32%
Child started school
144 INDEX SCORE

50%
Purchased a car
147 INDEX SCORE

1%
Retired
52 INDEX SCORE

32%
Renovated house
155 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	52%	83
Savings and investments	45%	70
Personal care and wellness	41%	119
Experiences (e.g., concerts, events).	38%	100
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	36%	94
Home and decor	25%	146

CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY

13%

33.3M

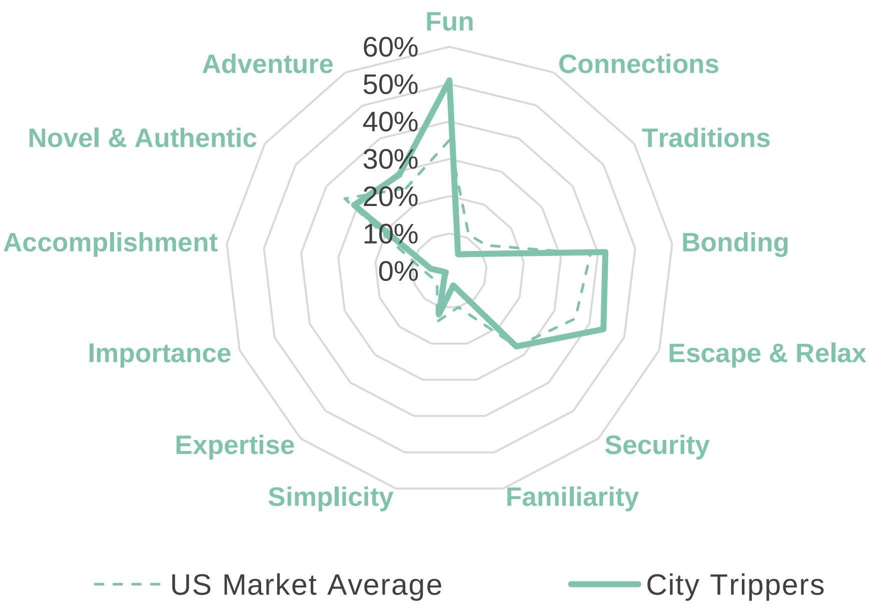
% OF US POPULATION

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 prefer the company of friends during travels to share experiences directly. Our travel group is generally adults only.
4. Convenience and easy access to trendy hotspots is important, as we appreciate destinations that are developed to welcome tourists.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

83

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

80

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 are social and vibrant with a lively atmosphere and good tourist facilities.
- We seek experiences that we can be proud of, and that we look forward to sharing with others.
- We like convenience, and appreciate the ease of famous sites, not always needing to learn something new.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	85%	137
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	82%	121
I completely disconnect from my work / home life while on holiday	73%	121
I generally don’t think much on the impact that I personally have on the destinations I visit	70%	121
I prefer destinations with well-established tourist infrastructure	63%	127
I generally stick to the most popular areas when I visit somewhere	61%	123
I will generally not go out of my way to buy local	60%	119
I like natural attractions but I don’t usually think they are the highlights of my trip	56%	125
While travelling I generally stick to places that are direct and convenient to get to	56%	115
I love posting my trips on social media to share with friends	47%	114
Videos and pictures on social media inspire me to travel	45%	111
I’m more interested in the present and don’t focus much on the history of where I visit	40%	118
When there’s a lot of positive buzz about a destination it makes me want to visit it more	36%	111

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	78%	133
To escape the demands of everyday life	48%	119
To indulge myself and live in the moment	46%	142
To have a fun, social setting	40%	151
To let loose and forget about day-to-day life	37%	130
To be proud to share my travel experiences	26%	121

DESIRED DESTINATION

	SCORE	INDEX
Fun	81%	141
Friendly	64%	124
Sociable	20%	119
Carefree	18%	115
Free-Spirited	15%	120
Trendy	7%	120

CITY TRIPPERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- Aged 25-55, working full-time, though some of us are already retired.
- Many of us are not parents, or our children are older and not living at home anymore.

68%
92 Have a valid passport

GENDER

Score	Index	
47%	83	Male
53%	118	Female
1%	91	Non-binary / Other

HOUSEHOLD

Score	Index	
15%	91	Children <18 Living At Home*
7%	91	Children 18+ Living At Home*
24%	98	Children NOT Living At Home*
61%	115	No Children

** Option is not exclusive*

AGE

	SCORE	INDEX
18-34	**29%**	104
35-54	**33%**	100
55+	**38%**	98
MEAN YEARS	**48.1**	97

HH INCOME (CAD)

	SCORE	INDEX
$70K or less	**27%**	128
>$70K to $275K	**63%**	68
More than $275K	**6%**	75
Refused	**5%**	124

EMPLOYMENT

	SCORE	INDEX
Employed FT	**50%**	98
Employed PT	**9%**	112
Self-employed	**4%**	89
Retired	**24%**	99

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	84
Secondary education	**30%**	112
Post-secondary education	**70%**	88

US STATE BREAKOUT

	SCORE	INDEX
California	**11%**	91
New York	**9%**	115
Florida	**8%**	112
Texas	**7%**	96
Illinois	**5%**	125
Ohio	**4%**	135

	SCORE	INDEX
Georgia	**4%**	115
Michigan	**4%**	118
Pennsylvania	**4%**	93
Virginia	**3%**	127
North Carolina	**3%**	91
Wisconsin	**3%**	133

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

76

TRAVEL TRADE INDEX: **GROUP**

89

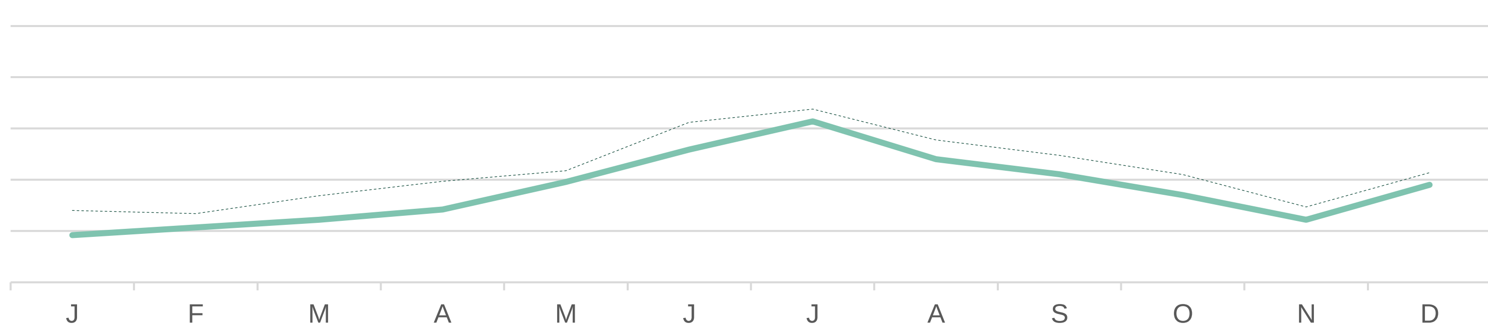
KEY terminology on this page

- **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

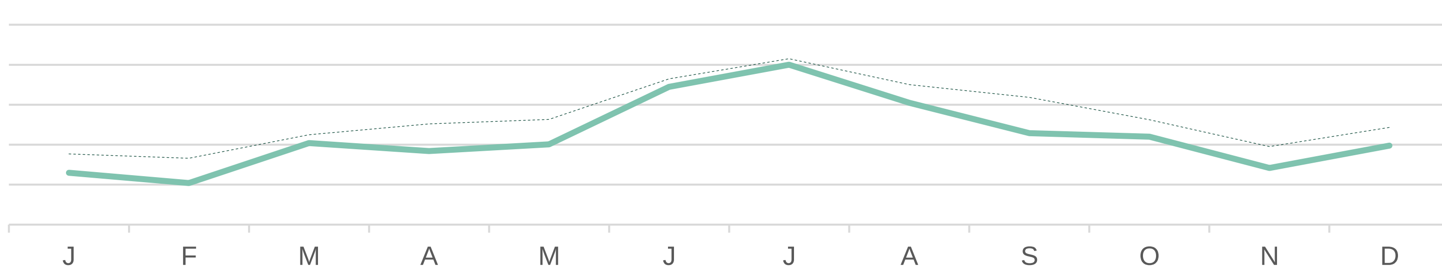
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	47%	101
3-5 Days	30%	93
1 Week Holiday	14%	86
2 Weeks Holiday	4%	78
3 Weeks Or More	1%	72

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	59%	111
International Leisure	5%	81
Business Trip	10%	84
Added Personal To Business	3%	79
Worked During Vacation	5%	82

Incidence is frequency of 2+ times per year

CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**64%**	131
Friend's or family's place	**34%**	128
Vacation Rental (e.g., Airbnb, Vrbo)	**22%**	101
Premium Hotel	**20%**	85
Budget Hotel	**11%**	114
All-inclusive resort	**10%**	103

THOUGHTS ON INDIGENOUS TRAVEL

40%

85 INDEX SCORE

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

7%

83 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	**75%**	105
I really want to learn about the history of the destinations I visit	**60%**	82
I'm willing to put in the effort while travelling in order to see lesser-known places	**44%**	85
I like to explore places that are off the beaten path and less explored	**39%**	77
I'm open to travelling to destinations with limited tourist infrastructure	**37%**	73
I'm open to visiting destinations with challenging climates or weather conditions	**24%**	91

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	47%	75
Adult relatives	31%	133
Friends	20%	141
Solo	16%	98
Kids	9%	91

BUDGET

AVERAGE SPEND SHORT-HAUL

$1,420 81 INDEX SCORE

AVERAGE SPEND MID-HAUL

$1,870 72 INDEX SCORE

SPEND STYLE

Mid-range to Premium

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	40%	81
It's important to me that I visit somewhere that is open to diversity and inclusion	36%	90
I consider the impact that I personally have on the destinations I visit	30%	79
Hearing from underrepresented communities is an important part of travelling	19%	84
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	18%	79

20%

PRIORITIZE SUSTAINABLE TRAVEL

79 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

- Festivals, events and shopping are most attractive. Amusement parks and zoos / aquariums could also capture our interest.
- Nightlife and local cuisine is also a highlight for us.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	59%	119
○ Local restaurants	54%	122
○ Cafes or bakeries	32%	121
○ Breweries	22%	133
Shopping	50%	139
○ Souvenir shopping	30%	135
○ Visiting famous shopping centres or areas	28%	142
Cultural experiences or attractions	56%	107
○ Museums	41%	110
○ Visiting local monuments	33%	107
Nightlife	28%	142
○ Bars and pubs	19%	142
○ Casinos	14%	149
Festivals and events	55%	139
○ Music concerts or festivals	38%	143
○ Sporting events	23%	141
Family-focused attractions	35%	99
Nature experiences	28%	70
Guided tours	28%	100
Casual sports	12%	85
Health and wellness	13%	88
Water-based sports	10%	85
Overnight experiences	20%	85

CITY TRIPPERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	67%	112	70%	127
To spend time with family	49%	96	49%	102
To escape from routine	48%	105	42%	110
To have fun with friends	40%	144	39%	139
For adventure and excitement	35%	100	33%	96
To check off dream travel places	21%	109	19%	93
For a romantic getaway	11%	90	11%	77
To learn through other cultures	9%	87	12%	74
To have memories from top travel spots	6%	81	7%	57

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Visiting friends / family	50%	124	50%	126
Partner / spouse wanted to go	47%	89	44%	87
Family / friends wanted to go	47%	128	37%	109
Special event (e.g., wedding, reunion)	35%	120	29%	100
Festival or event	35%	132	30%	115
Kids wanted to go	10%	91	11%	92

15% 87 INDEX SCORE

Travel aligns with children's school schedule

25% 87 INDEX SCORE

Take time off for vacation during major holidays

18% 90 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, typically thinking about trips over 4 months in advance.

59%

Primary Trip Planner

90
INDEX SCORE

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

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

FLIGHT OF **0–3 HOURS / NO FLIGHT**		FLIGHT OF **3–7 HOURS**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 4.8 Months** ○ Travel review sites
Started Researching and Planning – 3.5 months ○ Recommendations from friends or family	**4 MONTHS** BEFORE MY TRIP	**Booked Transportation – 3.4 months** ○ Direct with company **Booked Accommodation – 3.3 months** ○ Travel booking sites / apps
Booked Accommodation – 2.5 months ○ Direct with company **Booked Transportation – 2.3 months** ○ Direct with company	**3 MONTHS** BEFORE MY TRIP	
	2 MONTHS BEFORE MY TRIP	**Booked Activities – 2.1 months** ○ Direct with company
Booked Activities – 1.7 months ○ Direct with company	**1 MONTH** BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Most of our trips are focussed on exploring new cities or towns.
- 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: 21% — 159 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only		**29%**
	Extended Family		**23%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants		**52%**
	Bars and pubs		**30%**
	Famous shopping centres / areas		**19%**
KEY BEHAVIOURS	City trip with partner and friends, famous attractions and experiencing nightlife		

% OF TOTAL TRIPS: 15% — 96 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Friends Trip		
DESTINATION TYPE	Beach Resort		**11%**
	Cultural Experience		**10%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**45%**
	Souvenir shopping		**27%**
	Clubs and dancing		**19%**
KEY BEHAVIOURS	More likely a beach resort, focus on getting outdoors, staying in a vacation rental		

% OF TOTAL TRIPS: 31% — 133 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○ (3 of 5)

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Small Cities & Town		**25%**
	Beach Resort		**16%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Security
ACTIVITIES	Local restaurants		**44%**
	Souvenir shopping		**16%**
	Museums		**12%**
KEY BEHAVIOURS	Safe and reliable couples getaway to escape and relax		

% OF TOTAL TRIPS: 15% — 133 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○ (3 of 5)

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple Only		**52%**
	Alone		**22%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Souvenir shopping		**13%**
	Cafes or bakeries		**11%**
	Nature walks		**9%**
KEY BEHAVIOURS	Budget-friendly trip to stay with friends and spend time together		

CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek trendy locations with ease of travel, where festivals, famous attractions, an nightlife are abundant.
- Our travel mainly spans across the US, with top spots being Florida, Nevada, and California.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
US	**75%**	118
Mexico	**4%**	97
UK	**2%**	87
France	**2%**	87
Canada	**2%**	77

	SCORE	INDEX
Italy	**2%**	83
Bahamas	**2%**	86
Spain	**1%**	92
Dominican Republic	**1%**	107
US Virgin Islands	**1%**	110

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is easy to travel around once there	**59%**	127
Is easy to travel to	**50%**	119
Renowned for food and drink experiences	**33%**	121
Language is not a barrier	**33%**	117
Has famous attractions	**33%**	129
Provides a variety of local festivals and events	**20%**	115
Has vibrant nightlife and entertainment	**15%**	134
Is a trendy destination	**11%**	126

CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

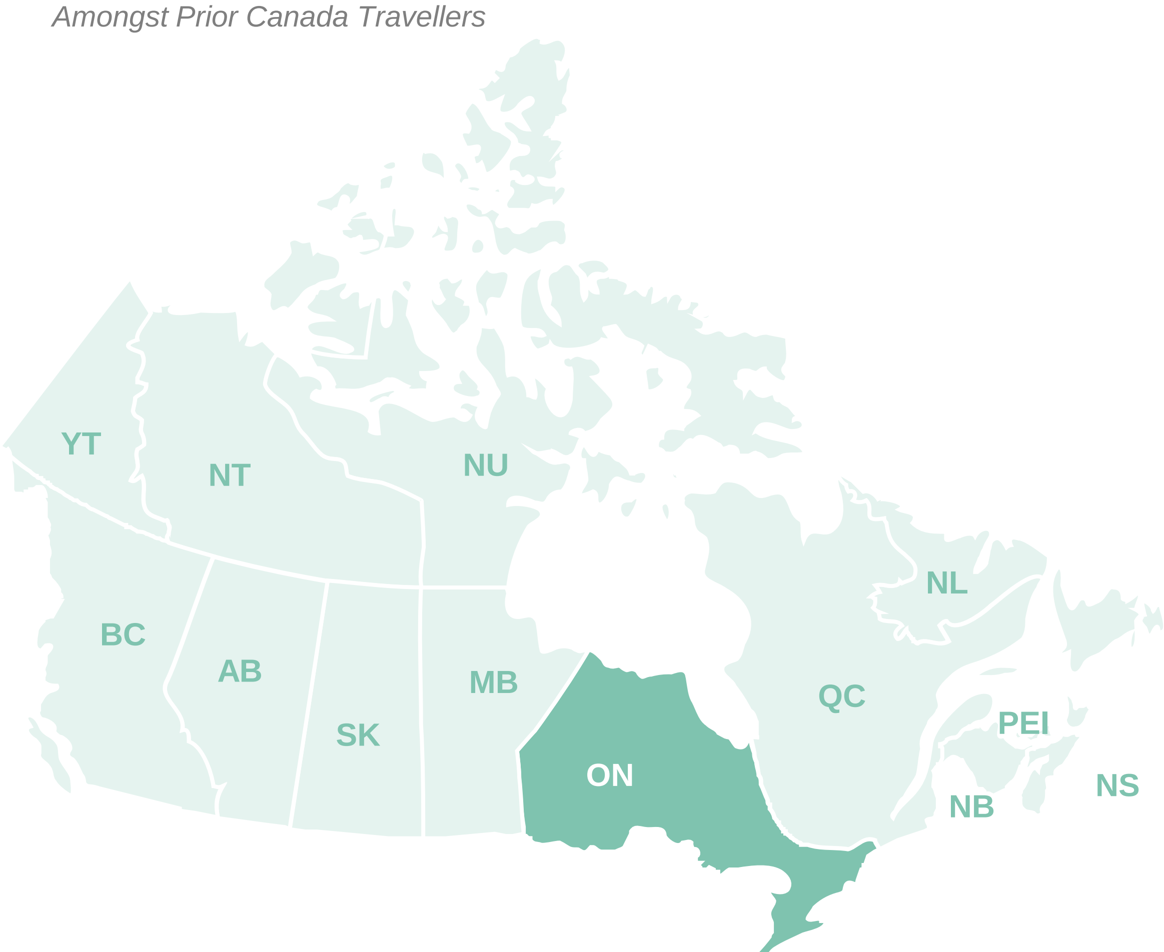
OVERALL INSIGHT

- More than half of us have visited Canada at least once.
- We are more likely to choose the bigger cities and experiences.
- Top provinces we visit in order are Ontario, Quebec and British Columbia.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	8%	72
BC	24%	58
MB	4%	78
NB	3%	70
NL	3%	82
NS	8%	77
NT	2%	80
NU	1%	81
ON	51%	131
PEI	4%	81
QC	31%	110
SK	2%	74
YT	1%	72

DESTINATION CANADA

CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- We primarily visit Canada in the summer, but there is opportunity to encourage fall travel.
- More than half are considerers but not necessarily in the next 2 years.

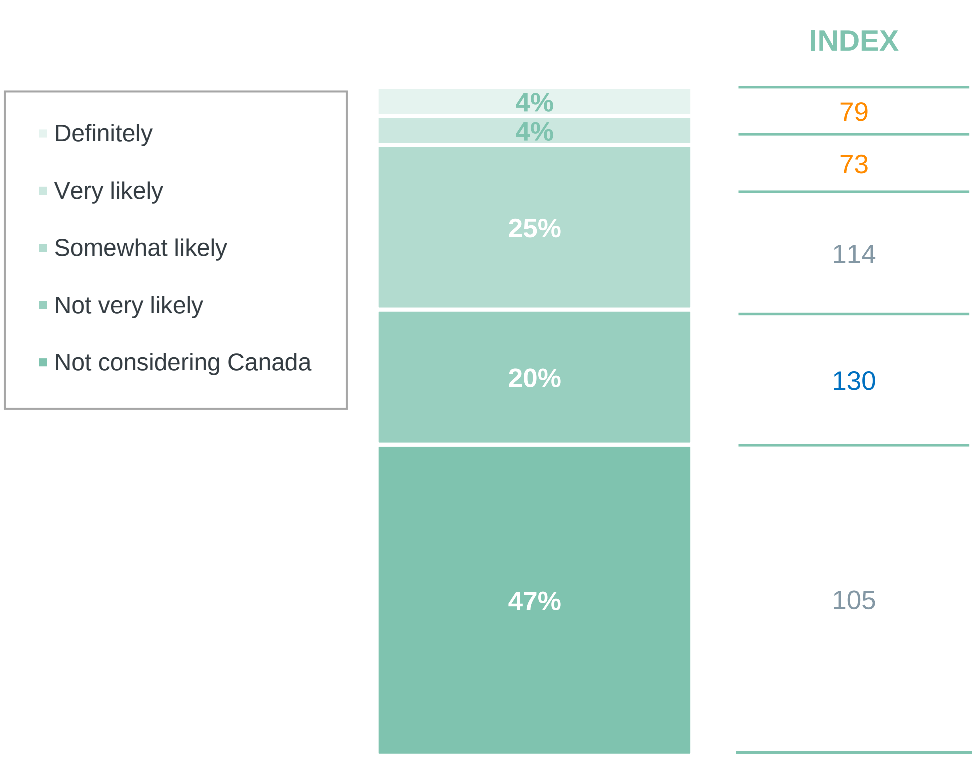
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	**10%**	**20%**	**62%**	**25%**
VS. TOTAL MARKET	14%	24%	58%	25%

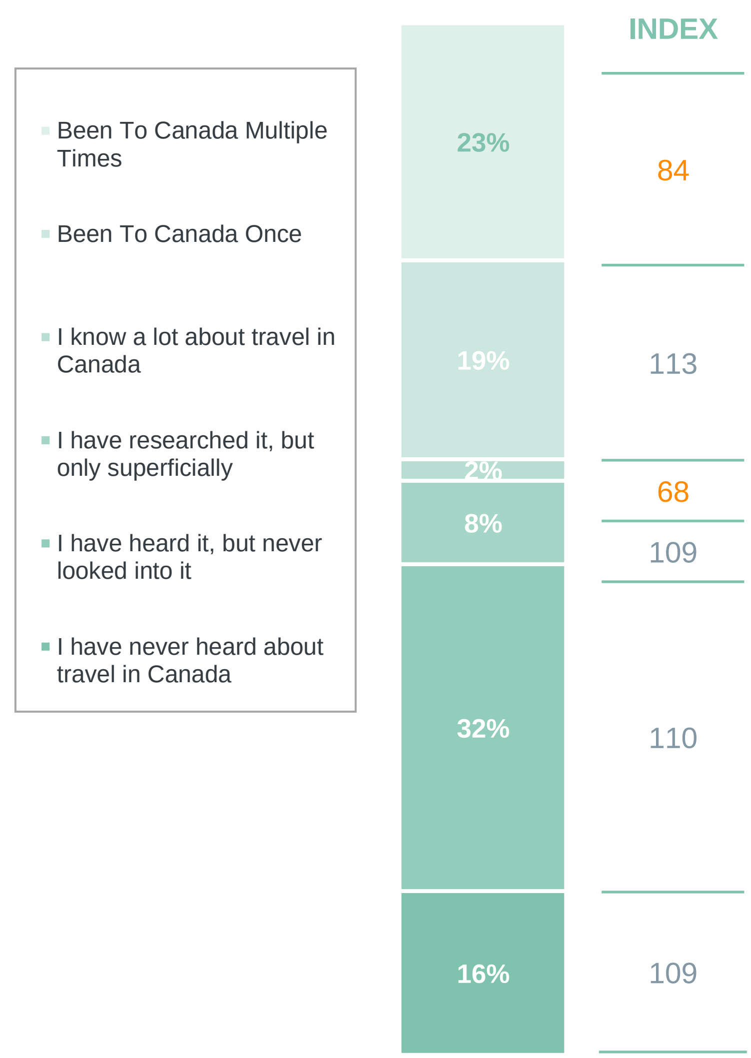
15% Been to Canada in last 5 years

83 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- In recent years we 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

4% Had a child 91 INDEX SCORE	**31%** Started a new job / career 123 INDEX SCORE	**18%** Bought a new home 112 INDEX SCORE	**18%** Moved to a new city 108 INDEX SCORE
5% Child started school 93 INDEX SCORE	**41%** Purchased a car 91 INDEX SCORE	**12%** Retired 110 INDEX SCORE	**16%** Renovated house 90 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	57%	98
Experiences (e.g., concerts, events).	49%	140
Savings and investments	47%	82
Personal care and wellness	38%	96
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	38%	99
Fashion and accessories	25%	134

SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY

11%

28.2M

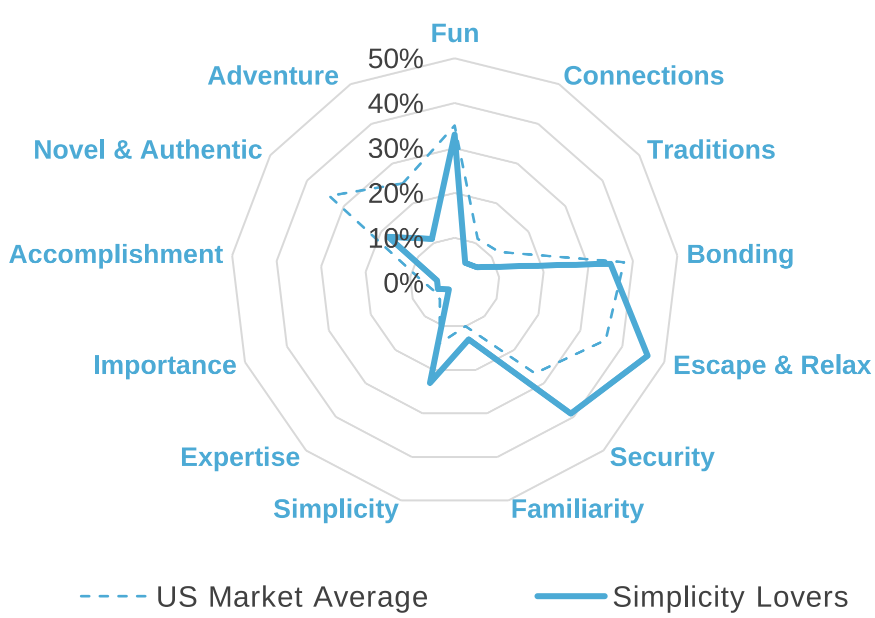
% OF US POPULATION

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.
3. Loyal to regular destinations, we are creatures of habit who favor simplicity and serenity over glitz, glamour, and cultural immersion.
4. While we mostly travel within the USA, if we enjoy a Canadian trip, we'll likely return during slower periods.

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

73

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 over trending hotspots and cultural immersion.
- Travel is a needed escape, we meander at our own pace, content to leave 'must-see' attractions unchecked.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer relying on traditional travel resources for planning	**91%**	138
I generally only choose destinations with comfortable climate and weather conditions	**87%**	130
I'm not influenced by social media content when it comes to travel	**87%**	149
Quiet, relaxed experiences are how I take care of myself on vacation	**86%**	149
I don't generally seek out luxury experiences while travelling	**86%**	125
I generally avoid places that are challenging or difficult to reach	**78%**	137
I generally don't try to learn local languages	**77%**	128
I prefer wandering around without a set agenda, even if that means missing some "famous" sites	**70%**	144
I generally prefer to go back to the same destinations on holiday	**62%**	152
I travel when I need to	**60%**	151
I seek out destinations that offer quiet opportunities for deep self-reflection	**60%**	138
I don't consider travel to be an important milestone of growing up	**45%**	152
You can get to know a country without experiencing its culture	**39%**	143

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	**68%**	116
To feel safe and secure	**56%**	148
To find much-needed time to relax	**52%**	129
To enjoy simple, straightforward travel	**34%**	153
To be familiar with my surroundings	**17%**	131
To feel confident travel with no surprises	**14%**	149

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	**78%**	140
Safe	**73%**	128
Peaceful	**67%**	149
Reliable	**39%**	147
Familiar	**32%**	151
Practical	**30%**	150

SIMPLICITY LOVERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are generally aged 55+.
- Retired or enjoying the later years of careers.
- Our monthly incomes are lower due to retirement, but our overall net worth is more comfortable.

60%
76 Have a valid passport

GENDER

Score	Index	
49%	89	Male
50%	109	Female
1%	136	Non-binary / Other

AGE

	SCORE	INDEX
18-34	7%	59
35-54	25%	84
55+	68%	134
MEAN YEARS	59.8	139

HH INCOME (CAD)

	SCORE	INDEX
$70K or less	26%	122
>$70K to $275K	64%	78
More than $275K	6%	77
Refused	5%	119

EMPLOYMENT

	SCORE	INDEX
Employed FT	36%	61
Employed PT	6%	54
Self-employed	3%	73
Retired	44%	136

EDUCATION

	SCORE	INDEX
Primary education or less	0%	84
Secondary education	37%	134
Post-secondary education	64%	66

HOUSEHOLD

Score	Index	
9%	86	Children <18 Living At Home*
11%	147	Children 18+ Living At Home*
45%	136	Children NOT Living At Home*
46%	98	No Children

** Option is not exclusive*

US STATE BREAKOUT

	SCORE	INDEX
California	10%	87
Florida	8%	102
New York	6%	72
Texas	6%	76
Arizona	4%	135
Illinois	4%	96

	SCORE	INDEX
Pennsylvania	4%	100
Washington	4%	127
North Carolina	4%	120
Ohio	3%	103
Tennessee	3%	124
Georgia	3%	95

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

72

TRAVEL TRADE INDEX: **GROUP**

68

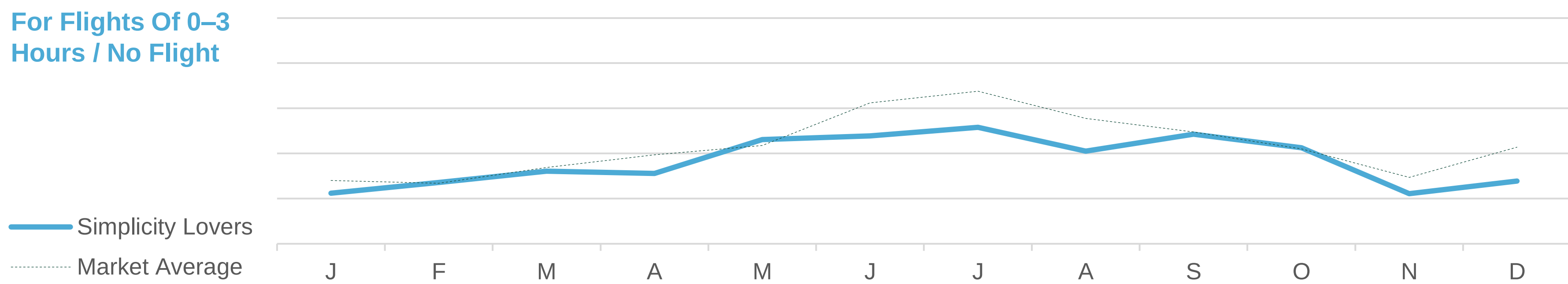
KEY terminology on this page

- **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

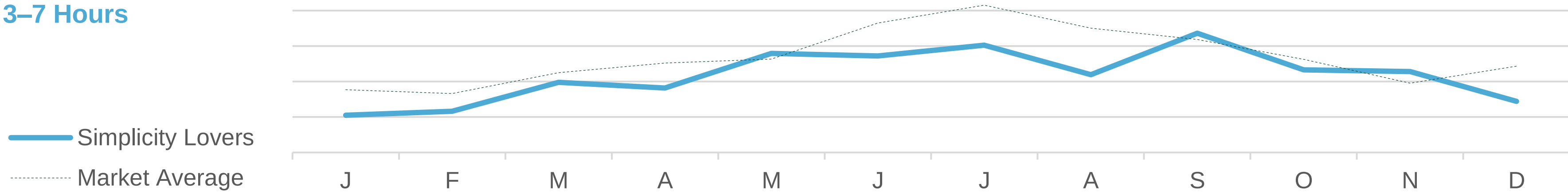
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	38%	55
3-5 Days	21%	55
1 Week Holiday	10%	71
2 Weeks Holiday	5%	82
3 Weeks Or More	2%	80

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	50%	60
International Leisure	3%	73
Business Trip	4%	69
Added Personal To Business	2%	72
Worked During Vacation	2%	71

Incidence is frequency of 2+ times per year

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**57%**	112
Friend's or family's place	**35%**	131
Premium Hotel	**20%**	84
Vacation Rental (e.g., Airbnb, Vrbo)	**16%**	76
Budget Hotel	**9%**	101
All-inclusive resort	**7%**	82

THOUGHTS ON INDIGENOUS TRAVEL

28%

65 INDEX SCORE

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

4%

70 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	**61%**	57
I really want to learn about the history of the destinations I visit	**56%**	75
I'm open to travelling to destinations with limited tourist infrastructure	**45%**	94
I like to explore places that are off the beaten path and less explored	**40%**	78
I'm willing to put in the effort while travelling in order to see lesser-known places	**29%**	61
I'm open to visiting destinations with challenging climates or weather conditions	**13%**	70

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel primarily with our partner or spouse.
- Our budgets are fairly conservative.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	64%	110
Adult relatives	26%	106
Solo	15%	97
Kids	9%	90
Friends	8%	73

BUDGET

AVERAGE SPEND SHORT-HAUL

$1,120 75 INDEX SCORE

AVERAGE SPEND MID-HAUL

$2,040 75 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	40%	81
I consider the impact that I personally have on the destinations I visit	31%	80
It's important to me that I visit somewhere that is open to diversity and inclusion	25%	74
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	17%	77
Hearing from underrepresented communities is an important part of travelling	14%	78

18%

PRIORITIZE SUSTAINABLE TRAVEL

76 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 and primarily include dining and shopping.
- We like to get outside for walks and may take in a museum or art gallery.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	**46%**	92
○ Local restaurants	**42%**	94
○ Cafes or bakeries	**18%**	79
○ Breweries	**7%**	63
Shopping	**36%**	99
○ Souvenir shopping	**18%**	88
○ Outdoor markets	**15%**	87
Nature experiences	**42%**	98
○ Nature walks	**21%**	90
○ Oceanside beaches	**22%**	101
Cultural experiences or attractions	**39%**	71
○ Museums	**28%**	72
○ Historical or archeological sites	**22%**	79
Casual sports	**14%**	94
○ Golfing	**7%**	116
○ Fishing	**5%**	94
Family-focused attractions	**35%**	99
Festivals and events	**21%**	73
Nightlife	**5%**	67
Guided tours	**18%**	75
Water-based sports	**8%**	78
Overnight experiences	**19%**	80
Health and wellness	**11%**	72

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	77%	136	73%	134
To escape from routine	60%	139	53%	138
To spend time with family	58%	108	53%	109
To have fun with friends	30%	109	30%	110
For adventure and excitement	16%	59	20%	65
For a romantic getaway	15%	129	12%	87
To check off dream travel places	11%	67	12%	56
To seek solitude and isolation	8%	116	11%	134
For personal reflection and growth	7%	88	5%	75

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	56%	110	50%	99
Visiting friends / family	51%	128	37%	63
Family / friends wanted to go	26%	79	24%	65
Special event (e.g., wedding, reunion)	26%	80	23%	62
Festival or event	13%	70	12%	63
Kids wanted to go	8%	90	7%	88

13% 85 INDEX SCORE

Travel aligns with children's school schedule

15% 62 INDEX SCORE

Take time off for vacation during major holidays

16% 81 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.

51%

Primary Trip Planner

71
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 0–3 HOURS / NO FLIGHT		FLIGHT OF 3–7 HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 5.5 Months** - Travel provider websites
	5 MONTHS BEFORE MY TRIP	
Started Researching and Planning – 3.4 months - Recommendations from friends or family	**4 MONTHS** BEFORE MY TRIP	**Booked Accommodation – 3.7 months** - Direct with company **Booked Transportation – 3.6 months** - Direct with company
Booked Accommodation – 2.5 months - Direct with company **Booked Transportation – 2.4 months** - Direct with company **Booked Activities – 1.9 months** - No need to book	**3 MONTHS** BEFORE MY TRIP	**Booked Activities – 2.5 months** - Direct with company
	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

48% 145 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Small Cities & Town	25%	
	Beach Resort	16%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants	44%	
	Souvenir shopping	16%	
	Museums	12%	
KEY BEHAVIOURS	Seeking mild climate to relax. Moderate budget, staying in a hotel		

% OF TOTAL TRIPS

22% 158 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple Only	52%	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Security
ACTIVITIES	Local restaurants	41%	
	Souvenir shopping	13%	
	Cafes or bakeries	11%	
KEY BEHAVIOURS	Want to avoid crowds, likely a return visit to a reliable destination		

% OF TOTAL TRIPS

12% 120 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Suburban Experience		
COMPANIONS	Alone	25%	
	Extended Family	21%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Security	Escape & Relax
ACTIVITIES	Local restaurants	41%	
	Zoos or aquariums	14%	
	Famous shopping centres / areas	9%	
KEY BEHAVIOURS	Likely visiting friends, which drives the destination choice		

% OF TOTAL TRIPS

15% 131 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only	29%	
	Extended Family	23%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants	52%	
	Bars and pubs	30%	
	Museums	25%	
KEY BEHAVIOURS	Trip with friends to explore a familiar city, dine out, and have fun		

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are affordable, accessible, not-too crowded, and have pleasant weather.
- We take a couple shorter trips a year, almost always in the US.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
US	80%	127	UK	1%	75
Mexico	5%	121	Turks & Caicos Islands	1%	128
Bahamas	2%	129	Cayman Islands	1%	126
Canada	2%	75			
Aruba	1%	114			

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	70%	131
Is easy to travel to	64%	139
Isn't too crowded	62%	148
Is easy to travel around once there	61%	129
Has a mild and pleasant climate	53%	138
Language is not a barrier	42%	143
Provides a sense of personal safety	41%	130
Doesn't take too long to get there	39%	146

SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

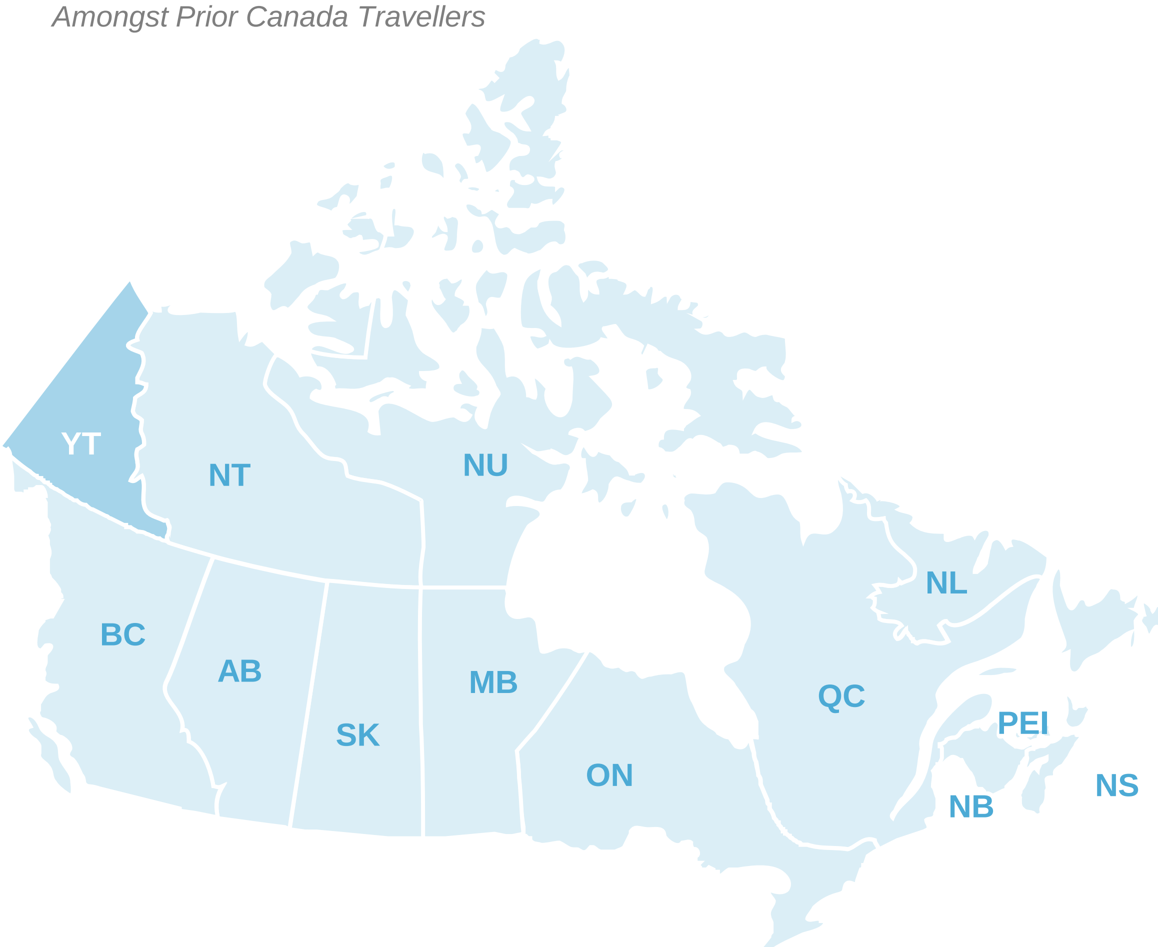
- Since we generally stay in the USA, we probably haven't been to Canada before.
- Trips to date have taken us to the common destinations, as well as the East Coast and sometimes even the Yukon.
- Possible future visits could include Vancouver, Toronto, Banff, with some interest in Quebec.

WHERE DO WE WANT TO GO IN CANADA

TORONTO KELOWNA WHISTLER VICTORIA QUEBEC
HONEY HARBOUR WHITE ROCK EDMONTON OTTAWA NIAGARA FALLS
GEORGIAN BAY VANCOUVER LAKE LOUISE
NOVA SCOTIA HALIFAX, NOVA SCOTIA BRITISH COLUMBIA
PRINCE RUPERT MONTREAL ONTARIO CALGARY NEWFOUNDLAND
MEDICINE HAT JASPER ALBERTA BANFF

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	13%	91
BC	37%	110
MB	5%	86
NB	8%	99
NL	4%	92
NS	13%	107
NT	3%	94
NU	0%	75
ON	46%	99
PEI	6%	102
QC	27%	88
SK	3%	82
YT	4%	122

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Those of us who have visited, have been in the spring, summer, and early fall.
- Some of us have visited, likely only once.

CANADA TRAVEL MONTHS ON A PAST TRIP

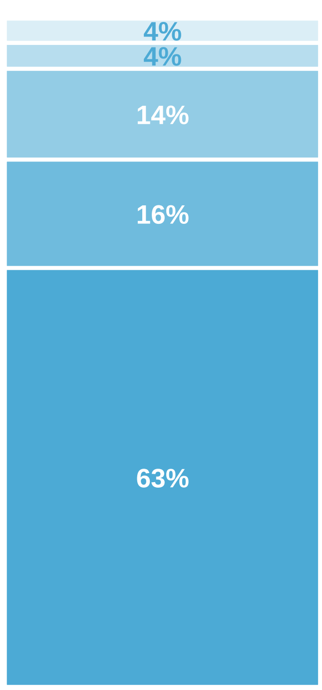
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	**7%**	**23%**	**65%**	**24%**
VS. TOTAL MARKET	14%	24%	58%	25%

12%

Been to Canada in last 5 years

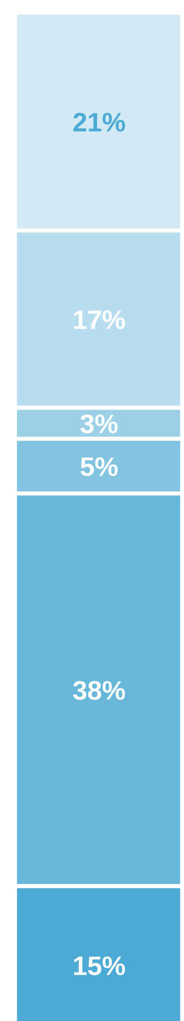
71 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



	INDEX
Definitely	75
Very likely	71
Somewhat likely	56
Not very likely	99
Not considering Canada	143

FAMILIARITY WITH CANADA



	INDEX
Been To Canada Multiple Times	79
Been To Canada Once	89
I know a lot about travel in Canada	104
I have researched it, but only superficially	68
I have heard it, but never looked into it	138
I have never heard about travel in Canada	107

DESTINATION CANADA

SIMPLICITY LOVERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- In our retirement we are prioritizing our spending on our hobbies and charities that are important to us.
- While many of us are retired, some of us have entered this life stage recently.

MAJOR LIFE EVENTS IN LAST 5 YEARS

1%
Had a child
85 INDEX SCORE

13%
Started a new job / career
52 INDEX SCORE

10%
Bought a new home
68 INDEX SCORE

12%
Moved to a new city
58 INDEX SCORE

2%
Child started school
89 INDEX SCORE

38%
Purchased a car
70 INDEX SCORE

14%
Retired
124 INDEX SCORE

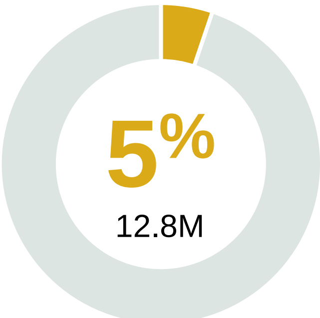
13%
Renovated house
78 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	62%	149
Travel	51%	79
Personal care and wellness	42%	123
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	38%	102
Experiences (e.g., concerts, events).	26%	58
Home and decor	22%	128

FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



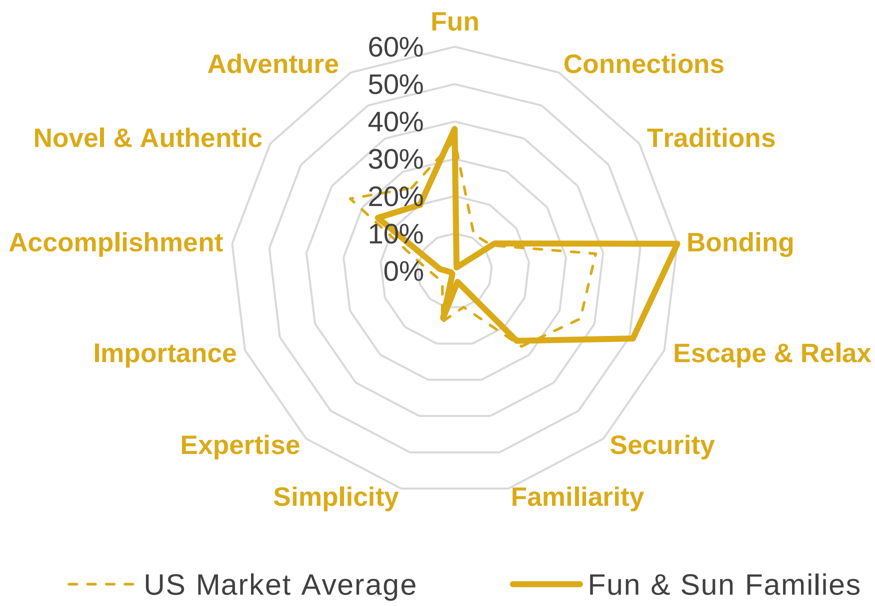
% OF US POPULATION

We cherish relaxation and shared family experiences in familiar, kid-friendly, and affordable destinations. We prioritize fun and simplicity over extravagance, gravitating towards well-known beaches and local spots with good communication standards. Our big family trips are often domestic, and focus on creating lasting memories through simple, enjoyable activities guided by our children's interests.

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences, 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 vacation months in advance, relying on review sites, videos, and travel professionals.
4. While we mostly travel within the USA, we dream of Hawaiian beaches and have some interest in Canadian hotspots.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

77

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

74

How is this calculated?

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

DESTINATION CANADA

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 prefer planning my trips independently and don't consult travel agencies	**90%**	122
I generally only choose destinations with comfortable climate and weather conditions	**85%**	127
I don't generally seek out luxury experiences while travelling	**83%**	120
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	**83%**	123
I prefer booking flights and accommodations well in advance	**82%**	126
I prefer destinations with lots of distractions and things to do	**76%**	122
I generally avoid places that are challenging or difficult to reach	**73%**	128
I generally don't think much on the impact that I personally have on the destinations I visit	**73%**	126
I tend to choose a destination to visit based off value for money	**71%**	143
I will generally not go out of my way to buy local when travelling	**68%**	135
I generally stick to the most popular areas when I visit somewhere	**62%**	125
While travelling I generally stick to places that are direct and convenient to get to	**61%**	122
I'm more interested in the present and don't focus much on the history of where I visit	**46%**	129

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	**71%**	149
To just enjoy myself and have fun	**68%**	115
To escape the demands of everyday life	**57%**	138
To find much-needed time to relax	**56%**	137
To bond through shared experiences	**50%**	144
To let loose and forget about day-to-day life	**36%**	126

DESIRED DESTINATION

	SCORE	INDEX
Fun	**72%**	130
Safe	**71%**	124
Relaxed	**70%**	129
Friendly	**67%**	129
Peaceful	**53%**	120
Familiar	**18%**	112

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 earn a middle-class income, and don't have a post-secondary education.

AGE

	SCORE	INDEX
18-34	**27%**	99
35-54	**58%**	152
55+	**16%**	71
MEAN YEARS	**42.7**	78

HH INCOME (CAD)

	SCORE	INDEX
$70K or less	**18%**	86
>$70K to $275K	**70%**	131
More than $275K	**7%**	88
Refused	**5%**	131

EMPLOYMENT

	SCORE	INDEX
Employed FT	**54%**	108
Employed PT	**10%**	130
Self-employed	**6%**	131
Retired	**8%**	70

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	148
Secondary education	**32%**	120
Post-secondary education	**67%**	79

53%
60 Have a valid passport

GENDER

38% 55 Male

61% 145 Female

1% 91 Non-binary / Other

HOUSEHOLD

81% 142 Children <18 Living At Home*

8% 95 Children 18+ Living At Home*

9% 72 Children NOT Living At Home*

10% 57 No Children

** Option is not exclusive*

US STATE BREAKOUT

	SCORE	INDEX
California	**7%**	62
Pennsylvania	**7%**	161
Florida	**6%**	51
Michigan	**5%**	143
New York	**5%**	61
Kentucky	**5%**	157

	SCORE	INDEX
Arizona	**4%**	137
Illinois	**4%**	104
Texas	**4%**	57
New Jersey	**4%**	140
Tennessee	**4%**	140
Ohio	**3%**	97

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

80

TRAVEL TRADE INDEX: **GROUP**

69

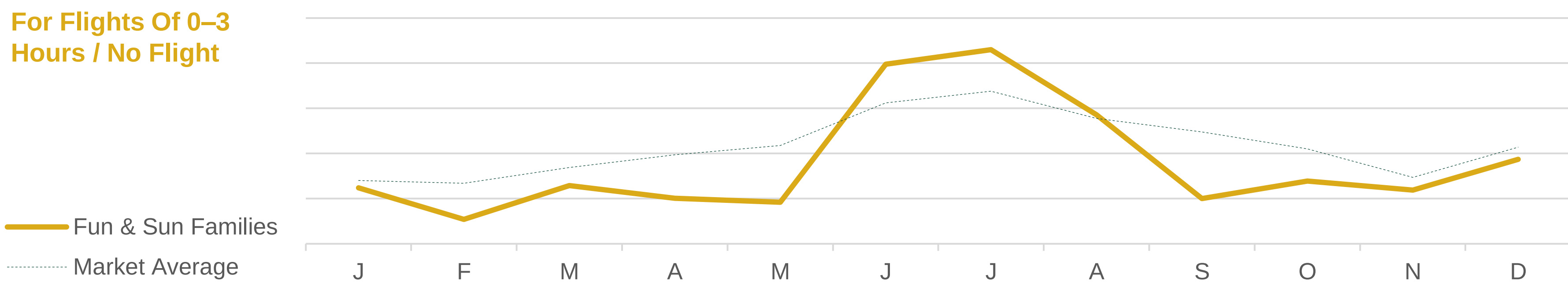
KEY terminology on this page

- **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

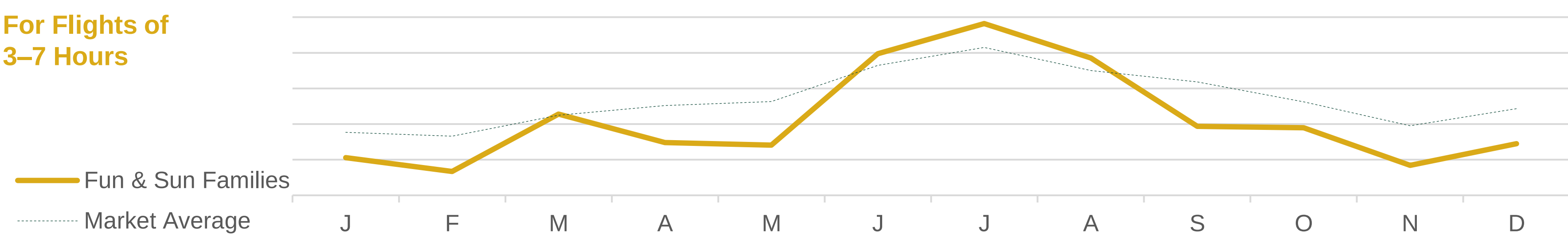
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	49%	109
3-5 Days	27%	81
1 Week Holiday	9%	69
2 Weeks Holiday	2%	69
3 Weeks Or More	2%	77

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	53%	77
International Leisure	2%	71
Business Trip	8%	78
Added Personal To Business	3%	75
Worked During Vacation	3%	76

Incidence is frequency of 2+ times per year

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	60%	120
Vacation Rental (e.g., Airbnb, Vrbo)	32%	141
Friend's or family's place	25%	93
Premium Hotel	22%	89
Budget Hotel	10%	110
All-inclusive resort	7%	83

THOUGHTS ON INDIGENOUS TRAVEL

36%

78 INDEX SCORE

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

4%

71 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	70%	87
I really want to learn about the history of the destinations I visit	54%	71
I'm open to travelling to destinations with limited tourist infrastructure	40%	81
I'm willing to put in the effort while travelling in order to see lesser-known places	40%	78
I like to explore places that are off the beaten path and less explored	38%	75
I'm open to visiting destinations with challenging climates or weather conditions	15%	73

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	75%	131
Kids	74%	149
Adult relatives	32%	138
Friends	9%	80
Solo	5%	65

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,510

96
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	32%	65
It's important to me that I visit somewhere that is open to diversity and inclusion	30%	81
I consider the impact that I personally have on the destinations I visit	28%	74
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	17%	77
Hearing from underrepresented communities is an important part of travelling	11%	74

23%

PRIORITIZE SUSTAINABLE TRAVEL

83 INDEX SCORE

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

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

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Family focussed attractions are the #1 priority.
- With so many trips to beaches, much of our outdoor activity is spent swimming.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	87%	154
○ Amusement parks or theme parks	63%	153
○ Zoos or aquariums	67%	154
○ Space or science centres	31%	148
Shopping	40%	110
○ Souvenir shopping	30%	134
○ Visiting famous shopping centres or areas	21%	115
Local cuisine	41%	81
○ Local restaurants	39%	88
○ Cafes or bakeries	19%	83
Nature experiences	44%	102
○ Visiting nature parks or preserves	28%	113
○ Hiking	25%	109
Cultural experiences or attractions	41%	74
○ Museums	29%	76
○ Visiting local monuments	23%	79
Festivals and events	28%	88
Water-based sports	13%	98
Guided tours	18%	75
Casual sports	12%	81
Nightlife	8%	78
Health and wellness	12%	78
Overnight experiences	16%	64

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF **0–3 HOURS / NO FLIGHT**		TRIPS OF FLIGHTS OF **3–7 HOURS**	
	SCORE	**INDEX**	**SCORE**	**INDEX**
To spend time with family	**89%**	151	**85%**	154
To relax and unwind	**71%**	122	**58%**	103
To escape from routine	**53%**	119	**46%**	119
For adventure and excitement	**30%**	89	**29%**	85
To have fun with friends	**18%**	70	**23%**	86
To check off dream travel places	**14%**	82	**16%**	80
For a romantic getaway	**8%**	52	**11%**	83
To have memories from top travel spots	**6%**	83	**9%**	78
To learn through other cultures	**3%**	73	**11%**	70

EXTERNAL TRIP TRIGGERS

	SCORE	**INDEX**	**SCORE**	**INDEX**
Kids wanted to go	**70%**	146	**68%**	144
Partner / spouse wanted to go	**66%**	136	**65%**	128
Family / friends wanted to go	**51%**	139	**45%**	135
Visiting friends / family	**39%**	56	**41%**	80
Special event (e.g., wedding, reunion)	**25%**	77	**27%**	87
Festival or event	**15%**	76	**13%**	65

65% 147 INDEX SCORE

Travel aligns with children's school schedule

34% 110 INDEX SCORE

Take time off for vacation during major holidays

24% 115 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 4-6 months in advance.

47%

Primary Trip Planner

63
INDEX SCORE

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

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

FLIGHT OF 0–3 HOURS / NO FLIGHT		FLIGHT OF 3–7 HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 6.2 Months** - Travel review sites
Started Researching and Planning – 4 months - Recommendations from friends or family	**5 MONTHS** BEFORE MY TRIP	**Booked Transportation – 4.2 months** - Direct with company
Booked Accommodation – 3.1 months - Direct with company **Booked Transportation – 2.9 months** - Direct with company	**4 MONTHS** BEFORE MY TRIP	**Booked Accommodation – 3.9 months** - Travel booking sites / apps
	3 MONTHS BEFORE MY TRIP	**Booked Activities – 2.1 months** - Direct with company
Booked Activities – 2.1 months - Direct with company	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips feature beaches and destinations known for family attractions.
- We sometimes take couples 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

21% 162 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear Family With Kids		**52%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**41%**
	Souvenir shopping		**36%**
	Swimming		**21%**
KEY BEHAVIOURS	Planned in advance, vacation rental or all-inclusive, relaxed destination		

% OF TOTAL TRIPS

46% 142 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Family Trip		
DESTINATION TYPE	Adventure Destination		**17%**
	Urban Centre		**12%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants		**32%**
	Amusement parks or theme parks		**26%**
	Zoos or aquariums		**26%**
KEY BEHAVIOURS	All about kids interests, famous kids attractions, lower budget		

% OF TOTAL TRIPS

30% 118 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Extended Family		
DESTINATION TYPE	Beach Resort		**26%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Souvenir shopping		**31%**
	Local restaurants		**31%**
	Nature parks or preserves		**13%**
KEY BEHAVIOURS	Larger group, repeat destination, ease of travel important		

% OF TOTAL TRIPS

14% 130 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only		**29%**
	Extended Family		**23%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants		**52%**
	Bars and pubs		**30%**
	Museums		**25%**
KEY BEHAVIOURS	Exploring a city with friends. Slightly higher budget, dining out, taking in nightlife		

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 is within the US, heading south in sunny Florida.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
US	84%	134
Mexico	4%	94
Aruba	2%	119
Bahamas	1%	81
Canada	1%	70

	SCORE	INDEX
UK	1%	73
Italy	1%	77
France	1%	74
Spain	1%	82
Jamaica	1%	108

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	79%	144
Is not too expensive	66%	126
Is easy to travel to	48%	115
Is easy to travel around once there	45%	104
Good connectivity (Wi-Fi, cell service, etc.)	31%	122
Doesn't take too long to get there	25%	116
Offers all-inclusive resort packages	13%	115
Has packaged holiday / vacation offers	10%	117

FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

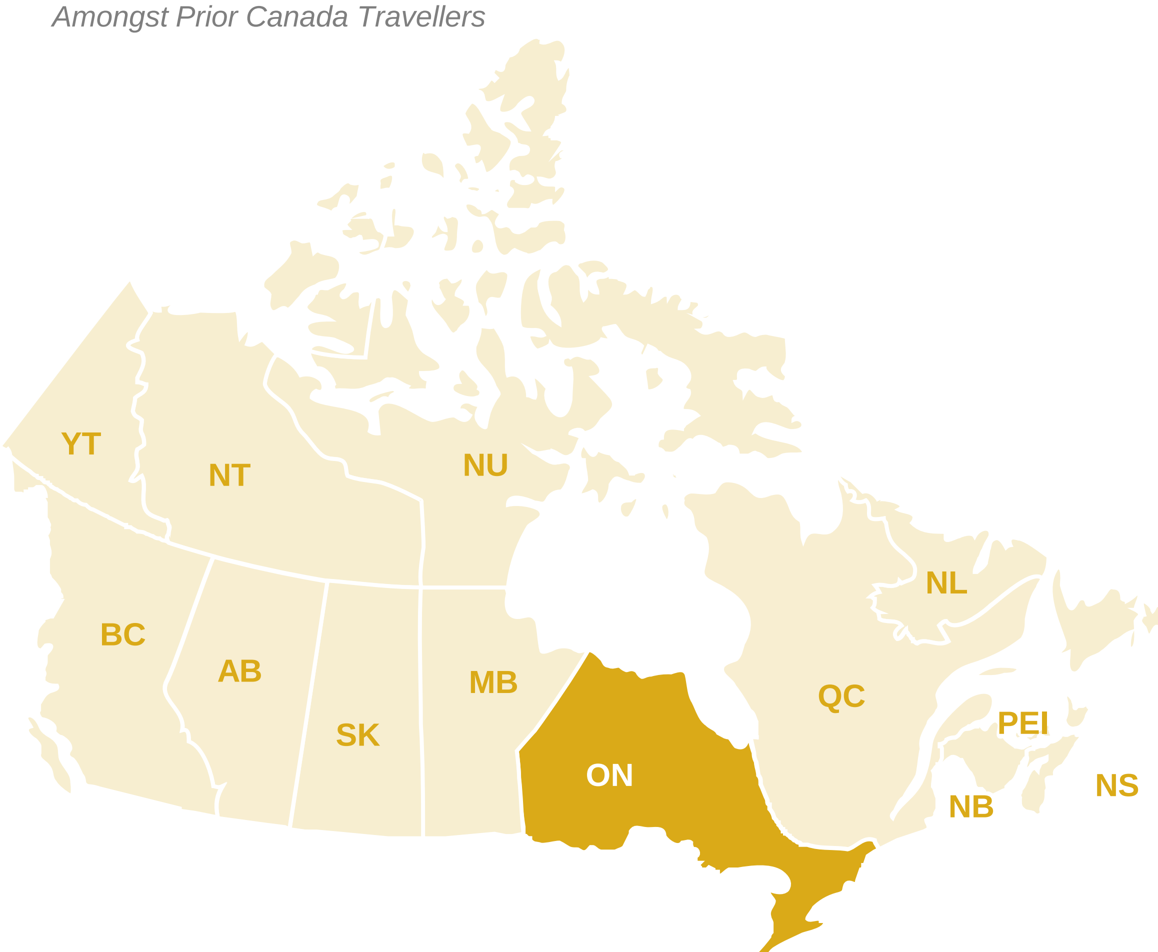
- Since we generally stay in the USA, we probably haven't been to Canada before.
- We stick close to the border and are most familiar with Ontario.
- We are generally not planning a visit in the future, but if we do visit, we will be headed for Toronto or another popular city.

WHERE DO WE WANT TO GO IN CANADA

NIAGARA FALLS BANFF QUEBEC
NOVA SCOTIA NEWFOUNDLAND HAWK JUNCTION
ONTARIO TORONTO THEME PARKS
MOUNTAINS BRITISH COLUMBIA
CITY VANCOUVER MONTREAL

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	7%	67
BC	33%	94
MB	1%	59
NB	1%	57
NL	2%	73
NS	4%	56
NT	0%	62
NU	1%	87
ON	51%	133
PEI	1%	62
QC	23%	65
SK	1%	72
YT	3%	97

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Those of us who have visited, have tried it once for a summer vacation.
- We generally don't know a lot about what Canada has to offer for a vacation.

CANADA TRAVEL MONTHS ON A PAST TRIP

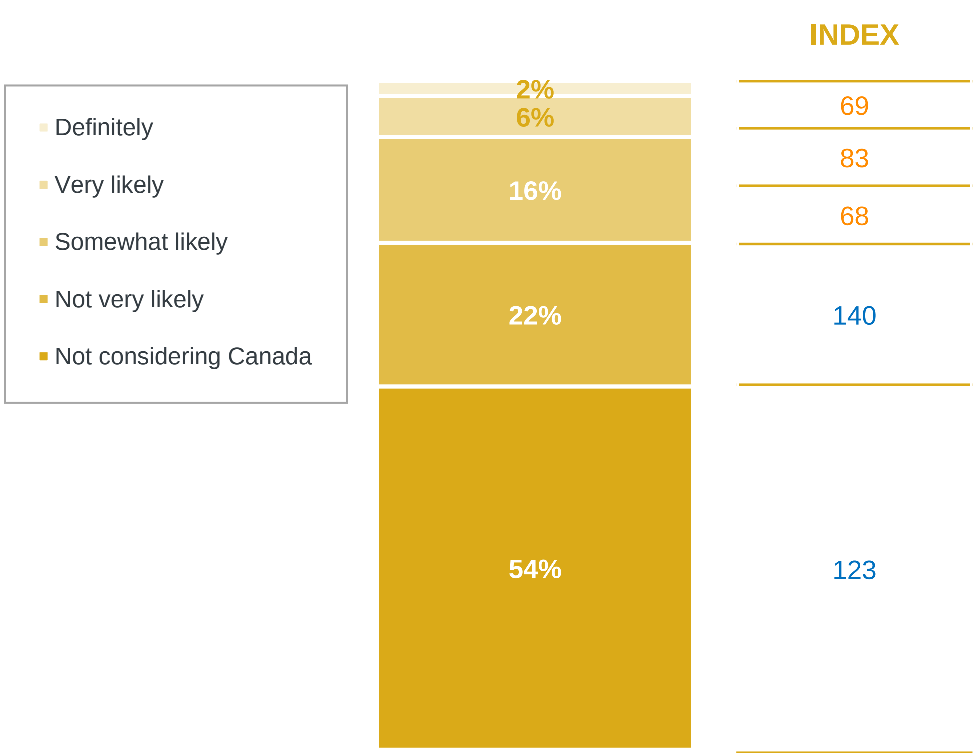
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	**11%**	**17%**	**62%**	**19%**
VS. TOTAL MARKET	14%	24%	58%	25%

11%

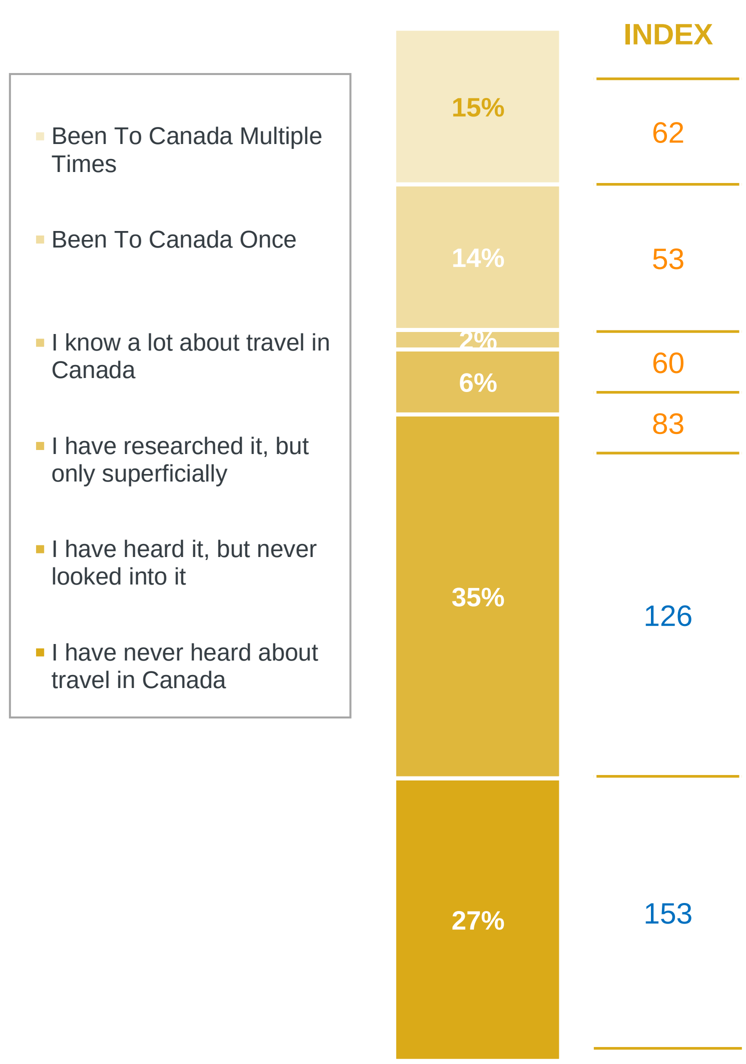
Been to Canada in last 5 years

68 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 big items, like a home 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

28%	Had a child	149 INDEX SCORE
26%	Started a new job / career	106 INDEX SCORE
19%	Bought a new home	122 INDEX SCORE
15%	Moved to a new city	83 INDEX SCORE
32%	Child started school	143 INDEX SCORE
45%	Purchased a car	119 INDEX SCORE
5%	Retired	72 INDEX SCORE
16%	Renovated house	89 INDEX SCORE

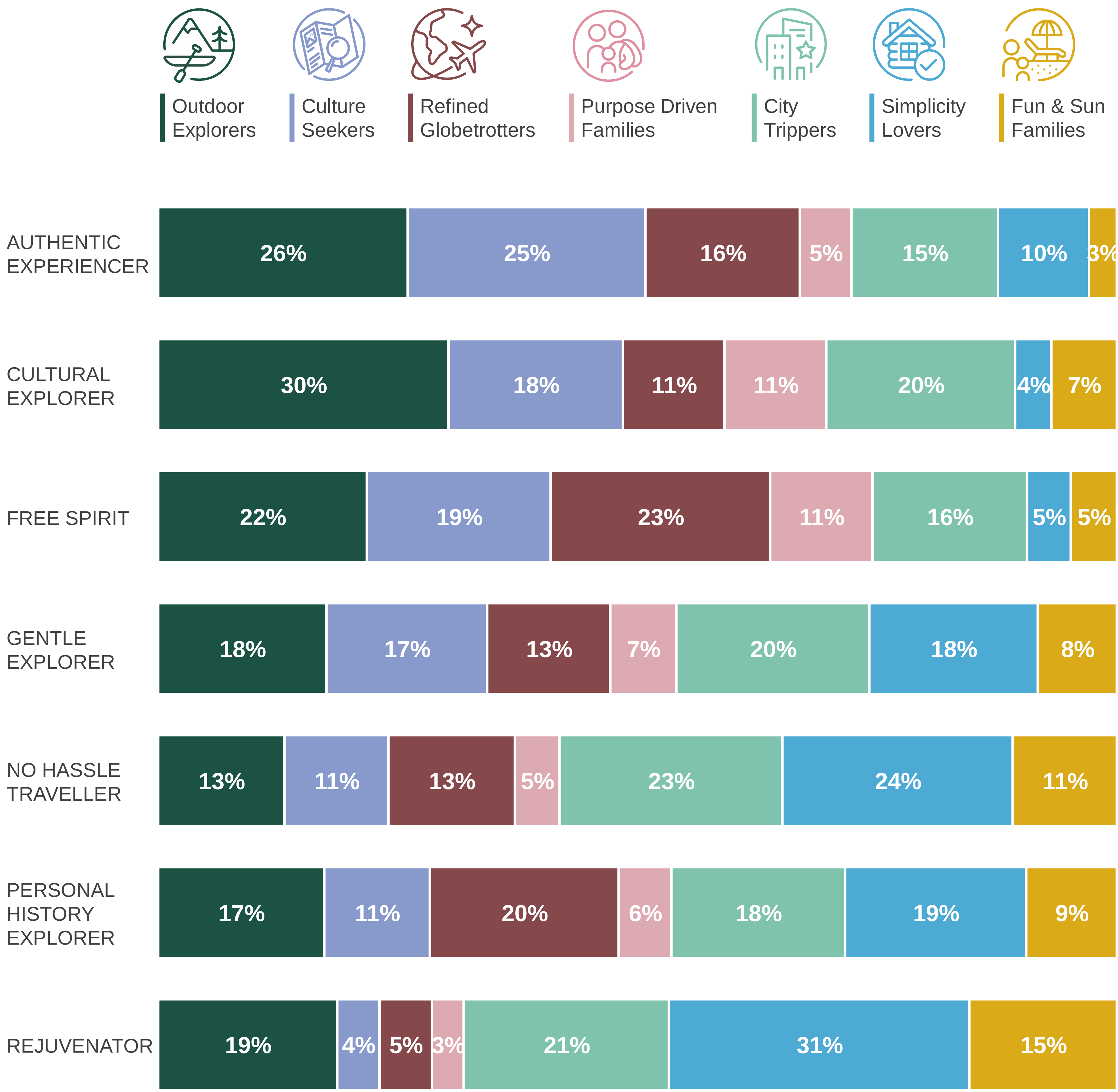
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	**52%**	101
Travel	**49%**	74
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**46%**	135
Personal care and wellness	**45%**	146
Experiences (e.g., concerts, events).	**41%**	111
Home and decor	**20%**	113

EXPLORER QUOTIENT MAPPING

MARKET LEVEL SEGMENT DISTRIBUTION ACROSS EQ SEGMENTS

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



GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

DETAILS AND DEFINITIONS

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