CANADA MARKET PROFILES

Canadians are known for their deep-rooted sense of adventure, constantly seeking new horizons both abroad and within their own vast and breathtaking backyard.

From relaxing on sun-soaked beaches to embracing the wilderness, Canadians journey both domestically and abroad in search of novel cultural experiences and nature-based escapes.

CANADA

DESTINATION CANADA

A GUIDE
TO UNDERSTANDING THE PROFILE

THE STRUCTURE

HOW TO READ THE DATA

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

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

FOR EXAMPLE:

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

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

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

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

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

KEY DEFINITIONS

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

! **KEY** terminology on this page…

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

MARKET OVERVIEW

KEY MARKET HIGHLIGHTS

- Canadians seek authenticity in their travel experiences. Travel is also an important way to connect with loved ones and create traditions
- Canadians are interested in friendly and accepting destinations that provide access to nature. They travel during winter months, and also escape to milder climates.
- Typically not luxury seekers, though some segments will spend more for desirable experiences.

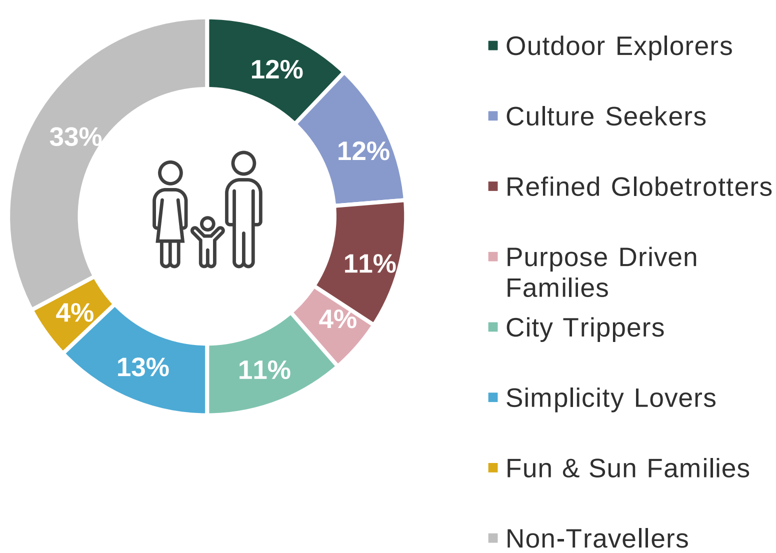
The Canadian travel market has a relatively even distribution of all segments with the highest frequency of Simplicity Lovers and Outdoor Explorers.

Canadians over-index in terms of being motivated to travel by a desire for novelty & authenticity, as well as fun. Overall as a market, there is a higher prioritization placed on health and safety standards, and a strong desire for destinations that come across as friendly and sociable.

Compared to other markets, Canadian travellers are more likely to take part in guided tours, overnight experiences, and festivals & events.

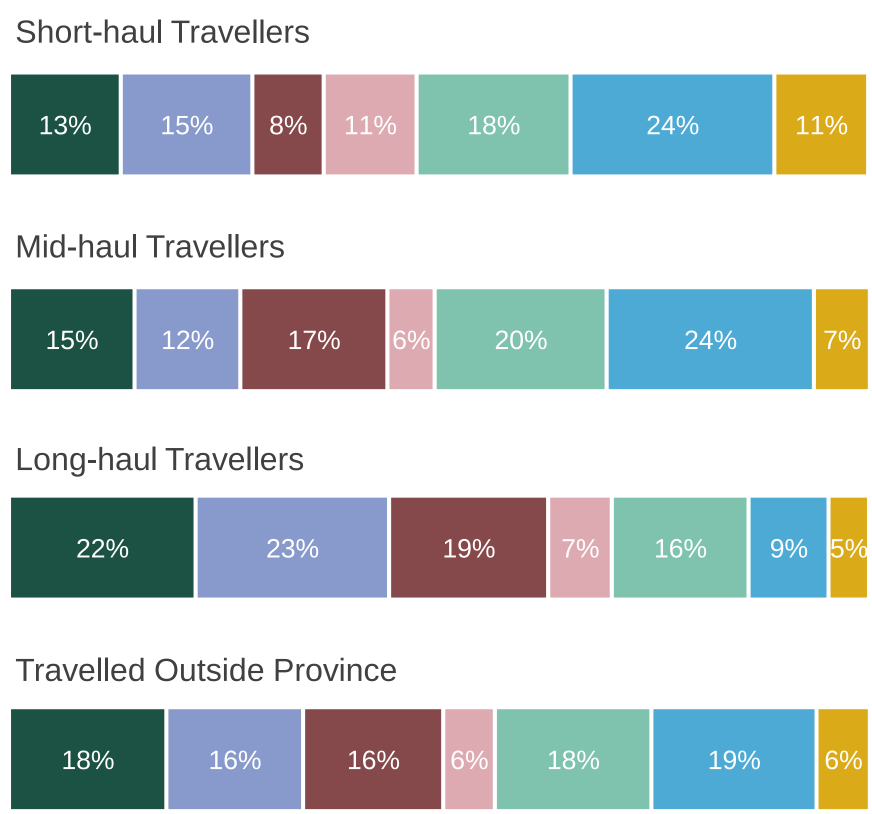
MARKET SIZING

POPULATION BREAKDOWN



32.8% of the adult population in Canada (est. **28M**) are non-travellers (est. **9M**). 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

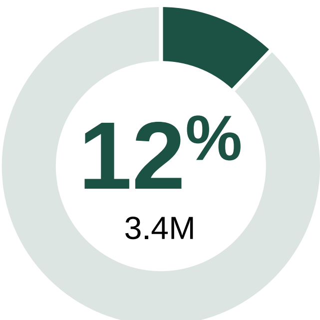
	Segment Size	Domestic Travel Likelihood Index	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	**3.4M**	**111**	○ Nature Experiences ○ Water Sports ○ High-Intensity Sports	○ Adventure ○ Novel & Authentic ○ Accomplishment
CULTURE SEEKERS	**3.2M**	**102**	○ Cultural Experiences & Attractions ○ Festivals & Events ○ Cuisine	○ Novel & Authentic ○ Connections ○ Familiarity
REFINED GLOBETROTTERS	**2.9M**	**103**	○ Cultural Experiences & Attractions ○ Cuisine ○ Guided Tours	○ Novel & Authentic ○ Security ○ Bonding
PURPOSE DRIVEN FAMILIES	**1.3M**	**99**	○ Family-Focused Attractions ○ Nature Experiences ○ Cultural Experiences & Attractions	○ Bonding ○ Novel & Authentic ○ Connections
CITY TRIPPERS	**3.2M**	**103**	○ Shopping ○ Cuisine ○ Festivals & Events	○ Fun ○ Escape & Relax ○ Bonding
SIMPLICITY LOVERS	**3.6M**	**88**	○ Nature Experiences ○ Shopping ○ Casual Sports	○ Escape & Relax ○ Security ○ Simplicity
FUN & SUN FAMILIES	**1.2M**	**85**	○ Family-Focused Attractions ○ Shopping ○ Water Sports	○ Escape & Relax ○ Bonding ○ Fun

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

- **DOMESTIC TRAVEL LIKELIHOOD INDEX** – Indicator of the overall likelihood to travel domestically. The index is calculated using ta combination of number of domestic trips per year, the likelihood of future out-of-province travel over next two years, and historical number of provinces visited. Indexed against other segments in the market.
- **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



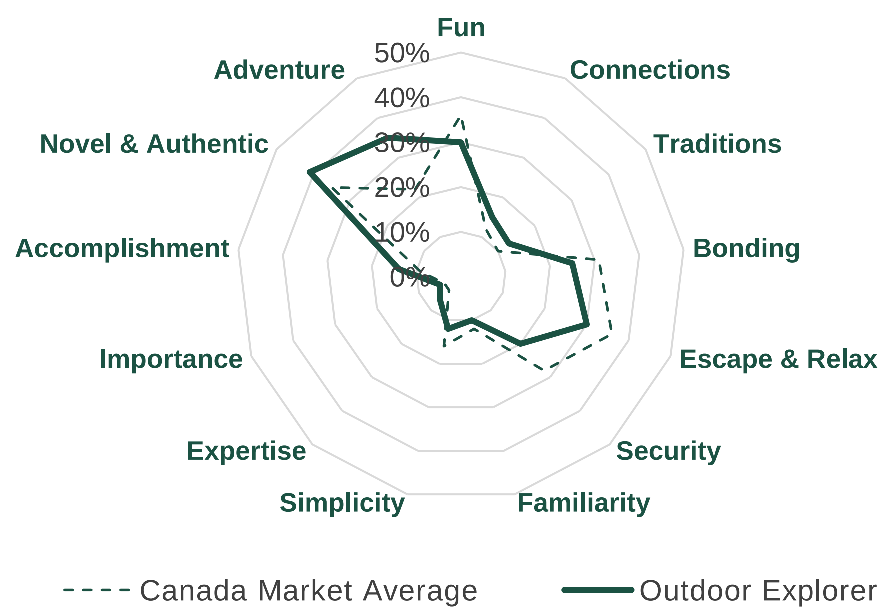
% OF CANADA POPULATION

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	Beyond adventure, we also prioritize learning something new in the destinations we visit, which is part of our personal growth.
3	We are always eager for new, authentic experiences that require a challenge.
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

110

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

101

How is this calculated?

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

OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- Travel fuels personal growth. We constantly seek new destinations to learn from.
- Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment.
- We prioritize adventurous, authentic, unexplored destinations, finding highlights in natural attractions.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like my holiday to have some form of physical activity	82%	144
Exploring the world through travel is an important milestone of growing up	81%	115
I'm always on the look out for new destinations to visit next	81%	122
I like to come back from travels having learnt something new	80%	118
When I travel to natural environments it makes me reflect on how fortunate I am	76%	134
I generally think natural attractions are the highlights of my trip	75%	148
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	73%	116
I'm passionate about travelling	71%	117
I go where I want to go, no matter the hurdles	62%	135
I'm open to unconventional accommodations when travelling	51%	135
I enjoy living in the moment while travelling and don't worry much about what comes next	46%	125
I love posting my trips on social media to share with friends	45%	119
I'd be open to using AI-powered chatbots for travel planning and assistance	31%	127

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	54%	122
To feel a sense of adventure	45%	147
To be proud to share my travel experiences	27%	123
To push my limits and challenge myself	16%	135
To create new, or take part in old, traditions	13%	123
To feel like I've accomplished something	13%	131

DESIRED DESTINATION

	SCORE	INDEX
Adventurous	56%	149
Authentic	42%	112
Unique	33%	125
Unexplored	22%	148
Free-Spirited	20%	138
Carefree	18%	123

OUTDOOR EXPLORERS

OUR DEMOGRAPHICS

AGE

	SCORE	INDEX
18-34	37%	120
35-54	32%	97
55+	31%	91
MEAN YEARS	44.6	86

HH INCOME (CAD)

	SCORE	INDEX
Less than $40K	21%	100
$40K to <$120K	66%	101
$120K or more	10%	106
Refused	3%	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	56%	112
Employed PT	7%	92
Self-employed	3%	74
Retired	20%	91

EDUCATION

	SCORE	INDEX
Primary education or less	0%	18
Secondary education	21%	91
Post-secondary education	78%	109

IMMIGRATION STATUS

	SCORE	INDEX
Non-immigrant	75%	96
Recent immigrant (<5y)	7%	116
Non-recent immigrant (5+y)	18%	95

73%
103 Have a valid passport

GENDER

55% 111 Male

45% 89 Female

0% 100 Non-binary / Other

HOUSEHOLD

22% 97 Children <18 Living At Home*

9% 102 Children 18+ Living At Home*

20% 94 Children NOT Living At Home*

57% 107 No Children

** Option is not exclusive*

CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	39%	91
Quebec	21%	91
British Columbia	16%	120
Alberta	12%	114
Saskatchewan	5%	129
Manitoba	4%	91
New Brunswick	2%	104
Nova Scotia	2%	88
Newfoundland and Labrador	1%	97
Prince Edward Island	0%	81

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

88

TRAVEL TRADE INDEX: **GROUP**

102

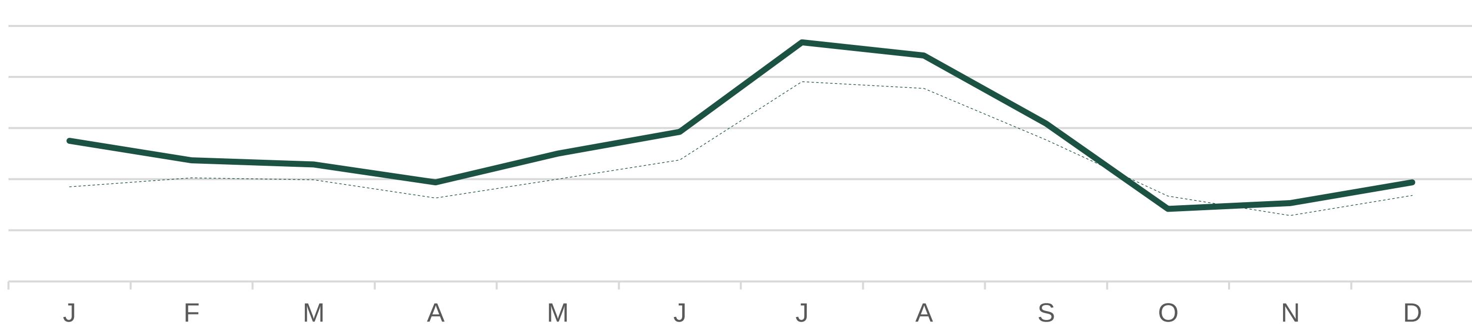
KEY terminology on this page

- **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.

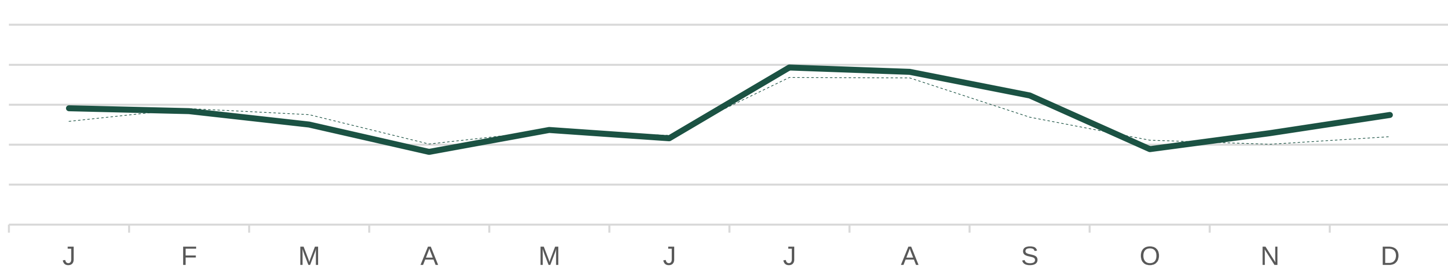
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	37%	129
3-5 Days	22%	128
1 Week Holiday	12%	103
2 Weeks Holiday	11%	111
3 Weeks Or More	5%	104

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	38%	123
International Leisure	17%	102
Business Trip	11%	119
Added Personal To Business	5%	103
Worked During Vacation	4%	104

Incidence is frequency of 2+ times per year

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**47%**	92
Vacation Rental (e.g., Airbnb, Vrbo)	**24%**	128
Friend's or family's place	**21%**	79
Premium Hotel	**21%**	105
Budget Hotel	**15%**	114
Campsite	**14%**	146

THOUGHTS ON INDIGENOUS TRAVEL

56%

118 INDEX SCORE

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

12%

126 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I like to explore places that are off the beaten path and less explored	**79%**	137
I'm willing to put in the effort while travelling in order to see lesser-known places	**74%**	135
You only ever get to know a country by experiencing its culture	**73%**	104
I really want to learn about the history of the destinations I visit	**67%**	99
I'm open to travelling to destinations with limited tourist infrastructure	**59%**	138
I'm open to visiting destinations with challenging climates or weather conditions	**41%**	133

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

- We travel with our partner, in larger groups, or alone.
- Our budgets are moderate, though we may spend more on experiences.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	53%	83
Adult relatives	22%	104
Solo	18%	115
Friends	16%	108
Kids	13%	96

BUDGET

AVERAGE SPEND SHORT-HAUL

$1,750 97 INDEX SCORE

AVERAGE SPEND MID-HAUL

$2,530 106 INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	54%	99
Hearing from underrepresented communities is an important part of travelling	46%	113
I consider the impact that I personally have on the destinations I visit	46%	98
It's important to me that I visit somewhere that is open to diversity and inclusion	44%	98
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	38%	114

42%

PRIORITIZE SUSTAINABLE TRAVEL

116 INDEX SCORE

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

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

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- All sports are of interest. We are not deterred by a challenging new activity.
- We also seek cultural experiences, and specifically to learn about local cultures.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	**70%**	146
○ Hiking	**46%**	151
○ Nature walks	**45%**	149
○ Viewing wildlife in natural habitat	**38%**	152
Water-based sports	**25%**	143
○ Swimming	**15%**	132
○ Kayaking, canoeing, or paddle-boarding	**15%**	151
Casual sports	**23%**	143
○ Fishing	**9%**	136
○ Ziplining	**5%**	147
Winter-based sports	**17%**	145
○ Snowboarding or downhill skiing	**11%**	149
○ Snowshoeing or cross-country skiing	**5%**	142
High-intensity sports	**10%**	136
○ Mountain biking	**6%**	145
○ Whitewater rafting	**5%**	148
Cultural experiences or attractions	**48%**	87
Local cuisine	**37%**	66
Guided tours	**33%**	102
Festivals and events	**27%**	91
Overnight experiences	**25%**	113
Family-focused attractions	**22%**	93
Health and wellness	**17%**	97

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

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	55%	82	48%	66
For adventure and excitement	48%	137	58%	143
To escape from routine	37%	79	35%	76
To spend time with family	31%	83	32%	94
To learn through other cultures	26%	108	32%	104
To have fun with friends	23%	94	22%	100
To check off dream travel places	21%	103	26%	111
For personal reflection and growth	13%	133	10%	114
To have memories from top travel spots	13%	150	10%	109

EXTERNAL TRIP TRIGGERS

EXTERNAL TRIP TRIGGERS	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	43%	86	40%	75
Visiting friends / family	39%	93	37%	112
Family / friends wanted to go	31%	92	31%	100
Festival or event	20%	99	20%	105
Special event (e.g., wedding, reunion)	19%	74	23%	108
Kids wanted to go	10%	93	9%	93

18% 98 INDEX SCORE

Travel aligns with children's school schedule

23% 99 INDEX SCORE

Take time off for vacation during major holidays

15% 104 INDEX SCORE

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

OUTDOOR EXPLORERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

63%

Primary Trip Planner

120
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 – 4.1 Months** ○ Travel booking sites / apps
Started Researching and Planning – 3.2 months ○ Online videos	**4 MONTHS** BEFORE MY TRIP	
Booked Accommodation – 2.1 months ○ Direct with company	**3 MONTHS** BEFORE MY TRIP	**Booked Accommodation – 2.9 months** ○ Travel booking sites / apps
Booked Transportation – 1.9 months ○ Travel booking sites / apps		**Booked Transportation – 2.8 months** ○ Travel booking sites / apps
Booked Activities – 1.4 months ○ Direct with company	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 1.5 months** ○ Direct with company
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

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

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

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

% OF TOTAL TRIPS

8% 107 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Wildlife & Nature Reserve		
COMPANIONS	Couple Only		**46%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Escape & Relax
ACTIVITIES	Nature walks		**42%**
	Viewing wildlife in natural habitat		**34%**
	Local restaurants		**23%**
KEY BEHAVIOURS	Seeking novel and off-the-beaten path access to wildlife and landscapes		

% OF TOTAL TRIPS

5% 89 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Mountain Retreat		
COMPANIONS	Extended Family		**31%**
	Couple Only		**30%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Hiking		**57%**
	Lakes, rivers, or waterfalls		**32%**
	Snowboarding or downhill skiing		**15%**
KEY BEHAVIOURS	Larger group, camping or a budget hotel, most likely to be winter-based		

% OF TOTAL TRIPS

18% 104 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban Centre		**29%**
	Cultural Experience		**19%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Adventure
ACTIVITIES	Local restaurants		**52%**
	Museums		**30%**
	Music concerts or festivals		**13%**
KEY BEHAVIOURS	Planned more last minute, seeking excitement via a festival or trendy city		

% OF TOTAL TRIPS

36% 144 INDEX SCORE

SEGMENT ALIGNMENT ● ● ○ ○ ○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban Centre		**18%**
	Small Cities & Towns		**17%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**40%**
	Famous shopping centres / areas		**18%**
	Nature walks		**16%**
KEY BEHAVIOURS	Relaxing down-time with our partner, visiting friends, less active		

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek access to adventure, wildlife and nature, and if it's remote and less-explored, even better!
- We take frequent trips in North America, and take international trips about once a year.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Canada	32%	103
US	24%	102
Mexico	6%	87
France	4%	98
UK	3%	103

	SCORE	INDEX
Italy	3%	85
Germany	2%	117
Portugal	2%	113
Cuba	2%	91
Dominican Republic	2%	84

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	49%	143
Provides access to unique natural wonders	47%	148
Provides opportunities to view wildlife in its natural habitat	41%	151
Provides numerous opportunities for outdoor adventures	39%	154
Offers a range of scenic viewpoints	36%	145
Has many hidden gems	29%	129
Provides a remote, no-frills experience	13%	140
Offers options for adrenaline seekers	12%	148

OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

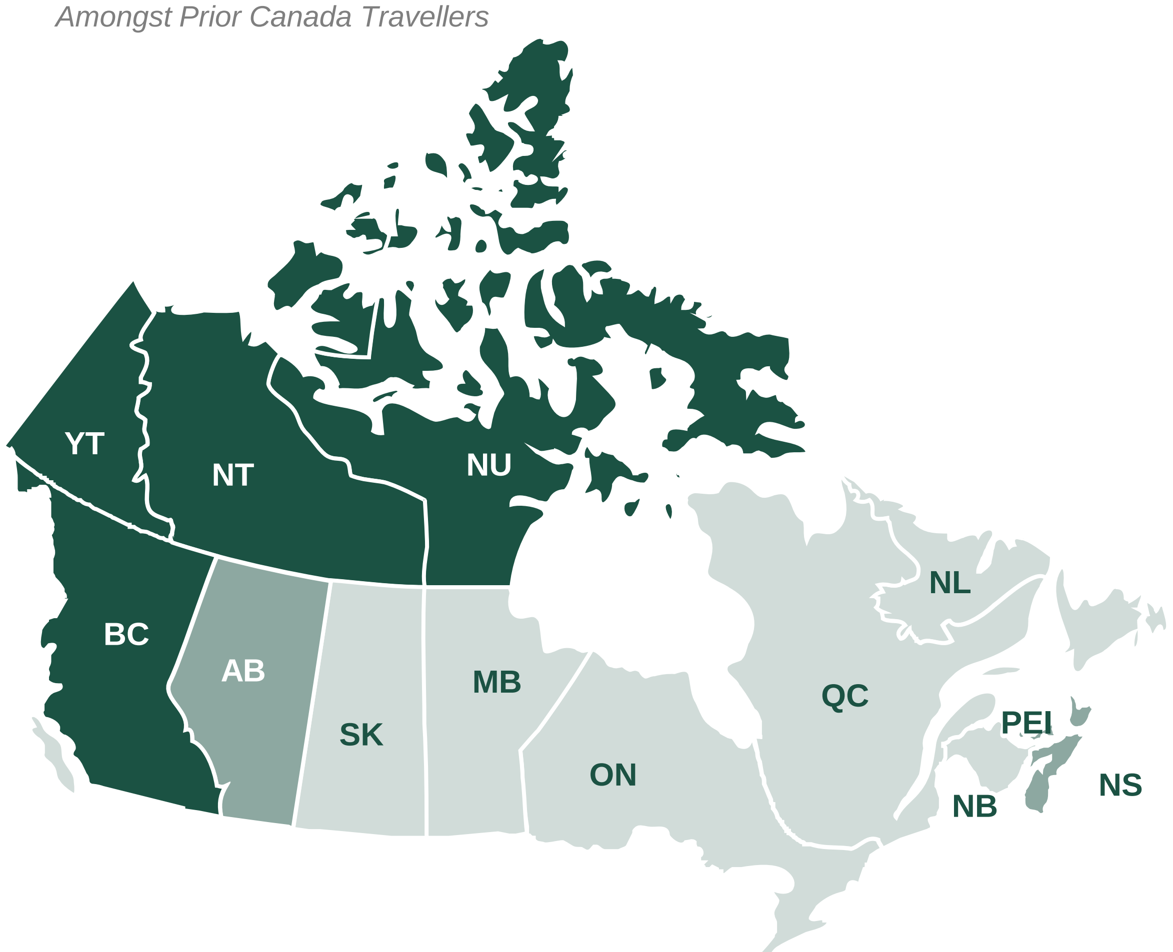
OVERALL INSIGHT

- We have explored most provinces, with a propensity towards mountain destinations, national parks, Quebec, and the Territories.
- Our next trip in Canada may be to British Columbia, Alberta, Quebec, or the East Coast.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	16%	121
BC	21%	125
MB	3%	93
NB	5%	98
NL	2%	94
NS	8%	118
NT	1%	145
NU	0%	144
ON	36%	103
PEI	4%	122
QC	22%	107
SK	2%	75
YT	1%	129

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

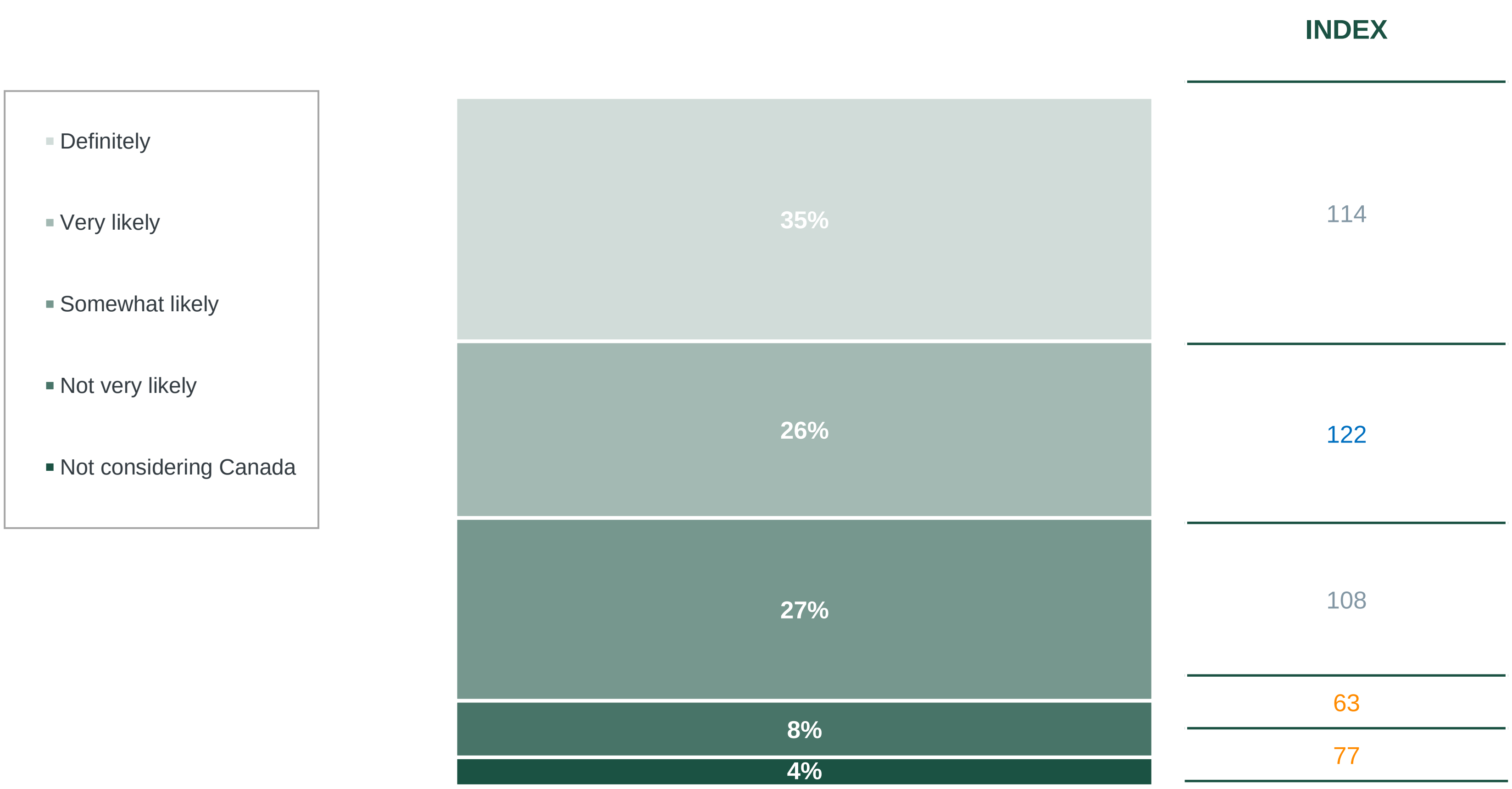
OVERALL INSIGHT

- We are definitely likely to be travelling outside our home province again soon.
- Typically we know what to expect for our trips within Canada, but Canada still often surprises and delights us!

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	**11%**	**8%**	**53%**	**30%**
VS. TOTAL MARKET	7%	12%	54%	29%

LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS



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

4%
Had a child
94 INDEX SCORE

36%
Started a new job / career
133 INDEX SCORE

12%
Bought a new home
92 INDEX SCORE

19%
Moved to a new city
120 INDEX SCORE

3%
Child started school
94 INDEX SCORE

40%
Purchased a car
100 INDEX SCORE

11%
Retired
100 INDEX SCORE

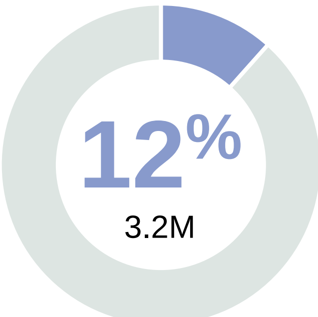
26%
Renovated house
101 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	60%	106
Savings and investments	51%	98
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	45%	117
Experiences (e.g., concerts, events).	37%	117
Personal care and wellness	35%	76
Technology and gadgets	22%	113

CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



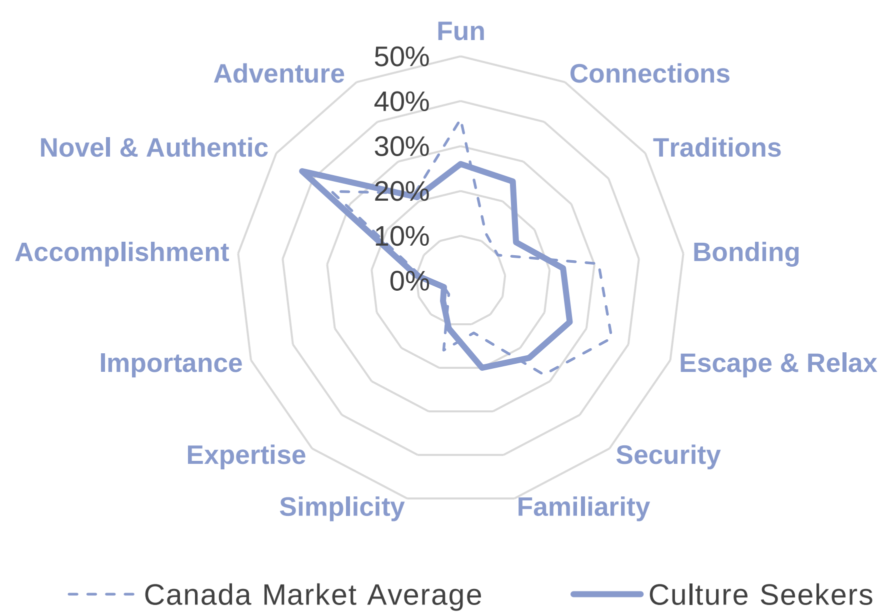
% OF CANADA POPULATION

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

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize diversity, inclusion and sustainability, and are open to both short and longer trips.
2. We like the challenge of a new experience, and aren't afraid of trying something different like unconventional accommodations.
3. We try to learn the basics of the language before we travel and learn something while we are there.
4. 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

133

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

105

How is this calculated?

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

CULTURE SEEKERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	83%	123
Trying out local cuisine is a really important part of travel	82%	129
Exploring the world through travel is an important milestone of growing up	81%	113
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	75%	121
I like to be able to take my time at a historic site or in a museum and not feel rushed	74%	130
I'm passionate about travelling	70%	115
I learn the basics of a language before visiting a country / region	66%	139
I am more likely to select destinations / activities that invest in socially responsible tourism	64%	123
I go where I want to go, no matter the hurdles	55%	125
While I think about value for money, it doesn't tend to influence my choice of destination	51%	125
I enjoy living in the moment while travelling and don't worry much about what comes next	49%	134
I'm open to unconventional accommodations when travelling	47%	128
I like to keep my travel plans flexible and often book on short notice	37%	133

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	47%	131
To open my mind to new perspectives	39%	130
To feel connected with new people	25%	139
To feel a sense of adventure	23%	98
To feel like a local	22%	143
To feel welcomed	19%	108

DESIRED DESTINATION

	SCORE	INDEX
Authentic	51%	133
Unique	31%	121
Accepting	30%	151
Open	25%	142
Sociable	24%	123
Passionate	17%	127

CULTURE SEEKERS

OUR DEMOGRAPHICS

AGE

	SCORE	INDEX
18-34	**34%**	113
35-54	**33%**	99
55+	**33%**	93
MEAN YEARS	**45.5**	90

HH INCOME (CAD)

	SCORE	INDEX
Less than $40K	**21%**	99
$40K to <$120K	**67%**	108
$120K or more	**9%**	101
Refused	**3%**	79

EMPLOYMENT

	SCORE	INDEX
Employed FT	**51%**	101
Employed PT	**9%**	114
Self-employed	**8%**	146
Retired	**19%**	90

EDUCATION

	SCORE	INDEX
Primary education or less	**1%**	75
Secondary education	**23%**	99
Post-secondary education	**76%**	103

IMMIGRATION STATUS

	SCORE	INDEX
Non-immigrant	**75%**	96
Recent immigrant (<5y)	**6%**	108
Non-recent immigrant (5+y)	**19%**	101

80%
118 Have a valid passport

GENDER

57% 118 Male

41% 79 Female

1% 153 Non-binary / Other

HOUSEHOLD

22% 97 Children <18 Living At Home*

8% 88 Children 18+ Living At Home*

18% 90 Children NOT Living At Home*

60% 110 No Children

** Option is not exclusive*

CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	**44%**	123
Quebec	**21%**	93
British Columbia	**15%**	113
Alberta	**9%**	77
Manitoba	**3%**	73
Nova Scotia	**3%**	117
Saskatchewan	**2%**	88
New Brunswick	**1%**	87
Prince Edward Island	**1%**	119
Newfoundland and Labrador	**1%**	90

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

97

TRAVEL TRADE INDEX: **GROUP**

105

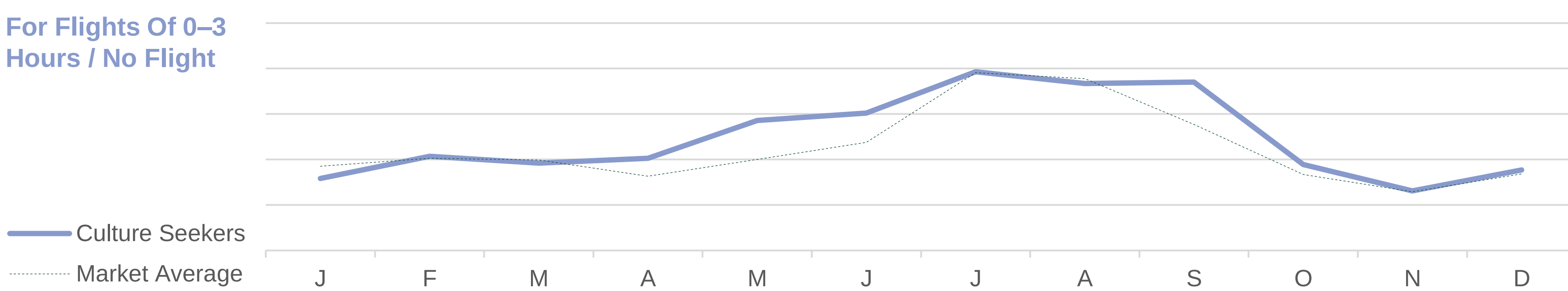
KEY terminology on this page

- **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.

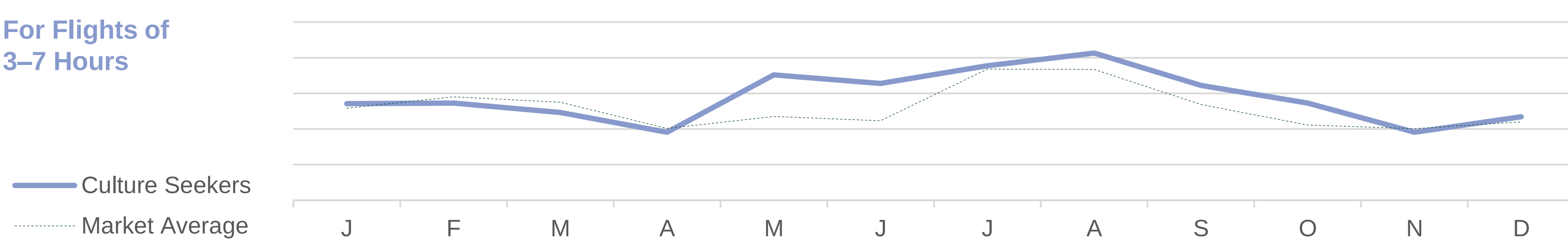
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	32%	71
3-5 Days	20%	110
1 Week Holiday	14%	111
2 Weeks Holiday	12%	120
3 Weeks Or More	8%	138

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	30%	71
International Leisure	17%	101
Business Trip	10%	117
Added Personal To Business	7%	117
Worked During Vacation	7%	130

Incidence is frequency of 2+ times per year

CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**45%**	87
Friend's or family's place	**26%**	101
Vacation Rental (e.g., Airbnb, Vrbo)	**23%**	121
Premium Hotel	**16%**	88
Budget Hotel	**16%**	119
All-inclusive resort	**16%**	92

THOUGHTS ON INDIGENOUS TRAVEL

63%

127 INDEX SCORE

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

12%

126 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%**	129
You only ever get to know a country by experiencing its culture	**79%**	120
I like to explore places that are off the beaten path and less explored	**70%**	125
I'm willing to put in the effort while travelling in order to see lesser-known places	**65%**	123
I'm open to travelling to destinations with limited tourist infrastructure	**52%**	125
I'm open to visiting destinations with challenging climates or weather conditions	**38%**	128

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	**53%**	81
Solo	**23%**	134
Adult relatives	**18%**	74
Friends	**13%**	97
Kids	**12%**	95

BUDGET

AVERAGE SPEND SHORT-HAUL

$2,740 143 INDEX SCORE

AVERAGE SPEND MID-HAUL

$2,700 114 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	**70%**	138
It's important to me that I visit somewhere that is open to diversity and inclusion	**68%**	136
I consider the impact that I personally have on the destinations I visit	**66%**	141
Hearing from underrepresented communities is an important part of travelling	**60%**	132
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**48%**	135

48%

PRIORITIZE SUSTAINABLE TRAVEL

128 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.
- When exploring cultural attractions, we actively engage and prioritize immersion.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	62%	122
○ Museums	44%	125
○ Historical or archeological sites	37%	115
○ Visiting local monuments	34%	120
Local cuisine	61%	124
○ Local restaurants	52%	127
○ Street cuisine	36%	141
Festivals and events	45%	130
○ Music concerts or festivals	25%	117
○ Cultural or traditional festivals	22%	140
Nightlife	17%	109
○ Bars and pubs	10%	104
○ Clubs and dancing	9%	114
High-intensity sports	5%	107
○ Mountain biking	3%	112
○ Whitewater rafting	2%	108
Nature experiences	39%	89
Shopping	31%	89
Guided tours	31%	98
Overnight experiences	20%	84
Family-focused attractions	15%	86
Casual sports	13%	80
Health and wellness	11%	71

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	51%	74	54%	80
To learn through other cultures	44%	140	43%	125
To escape from routine	33%	69	35%	77
To spend time with family	33%	85	29%	89
For adventure and excitement	29%	100	38%	112
To check off dream travel places	25%	119	24%	105
To have fun with friends	23%	92	20%	94
To be pampered	14%	127	12%	97
For a romantic getaway	13%	116	7%	78

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	42%	83	43%	80
Visiting friends / family	41%	102	34%	105
Festival or event	36%	142	27%	125
Family / friends wanted to go	30%	89	31%	99
Special event (e.g., wedding, reunion)	27%	105	25%	117
Kids wanted to go	11%	95	12%	96

19% 99 INDEX SCORE

Travel aligns with children's school schedule

25% 106 INDEX SCORE

Take time off for vacation during major holidays

14% 93 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 4 months of a trip, and using many information resources.

67%

Primary Trip Planner

135

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	
	4 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 3.7 Months** ○ Travel provider websites ○ Travel review sites
Started Researching and Planning – 2.9 months ○ Travel provider websites	**3 MONTHS** BEFORE MY TRIP	**Booked Transportation – 2.6 months** ○ Direct with company **Booked Accommodation – 2.2 months** ○ Travel booking sites / apps
Booked Accommodation – 1.9 months ○ Travel booking sites / apps **Booked Transportation – 1.9 months** ○ Direct with company **Booked Activities – 1.7 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	

CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips are about experiencing 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

23% 114 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban Centre		29%
	Cultural Experience		19%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Escape & Relax
ACTIVITIES	Local restaurants		52%
	Museums		30%
	Cafes or bakeries		28%
KEY BEHAVIOURS	Exploration of safe and trendy destinations, not planned too far in advance		

% OF TOTAL TRIPS

12% 122 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Cultural Experience		
COMPANIONS	Alone		39%
	Couple Only		25%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Bonding
ACTIVITIES	Local restaurants		56%
	Museums		41%
	Art galleries		41%
KEY BEHAVIOURS	Authentic experience, immersed in a new culture. Planned well in advance		

% OF TOTAL TRIPS

25% 174 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only		34%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		58%
	Bars and pubs		26%
	Souvenir shopping		24%
KEY BEHAVIOURS	Fun with family and friends, visiting restaurants and experiencing nightlife		

% OF TOTAL TRIPS

37% 143 INDEX SCORE

SEGMENT ALIGNMENT ●●○○○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach Resort		13%
	Luxury Resort		13%
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Bonding
ACTIVITIES	Local restaurants		44%
	Historical / archeological sites		24%
	City tours		21%
KEY BEHAVIOURS	May be all-inclusive destination or a cruise, booked more in advance		

CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek rich culture and heritage, with a variety of museums and historical sites.
- Our main areas of interest are Canada, US, and Europe, with past trips to France, Italy, Spain, and Mexico.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Canada	**26%**	83
US	**19%**	73
Italy	**6%**	135
UK	**5%**	135
France	**5%**	114

	SCORE	INDEX
Mexico	**5%**	64
Spain	**4%**	143
Japan	**3%**	125
Dominican Republic	**2%**	86
Portugal	**2%**	103

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**44%**	129
Has a variety of museums and / or historical sites	**35%**	129
Is inclusive and tolerant	**31%**	144
Renowned for food and drink experiences	**29%**	111
Provides a variety of local festivals and events	**28%**	145
Has many hidden gems	**26%**	116
Offers an energetic and dynamic cultural scene	**24%**	148
Has a thriving arts and music scene	**23%**	151

CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

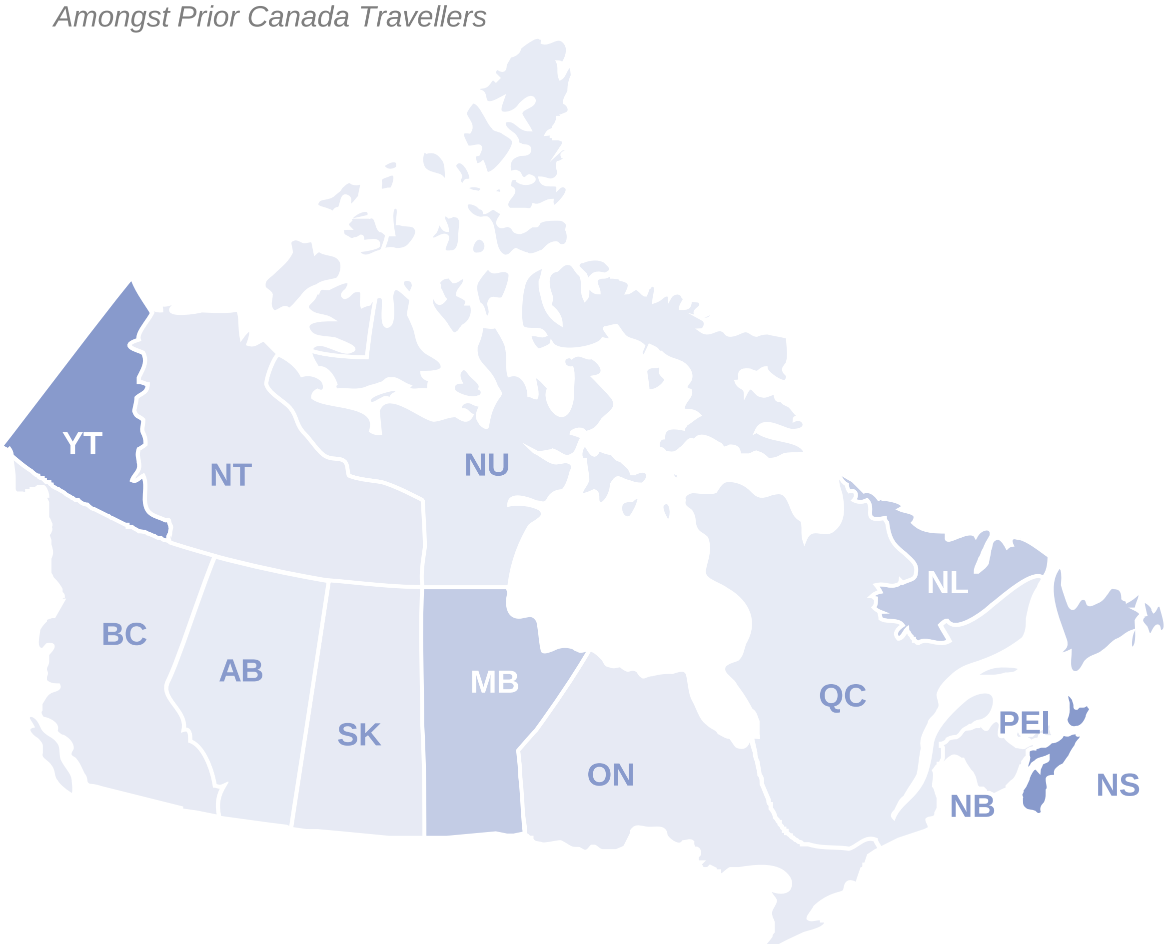
OVERALL INSIGHT

- We have a history of travelling across Canada, with travel experiences spanning across the country.
- Our travel preferences within Canada are diverse, with Ontario, Quebec, British Columbia, Nova Scotia, and New Brunswick topping our list.
- When exploring Canada, our penchant for bustling cities often guides our journey.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	11%	70
BC	20%	109
MB	4%	118
NB	5%	93
NL	3%	120
NS	10%	131
NT	0%	85
NU	0%	78
ON	34%	94
PEI	3%	100
QC	22%	107
SK	3%	92
YT	1%	129

CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

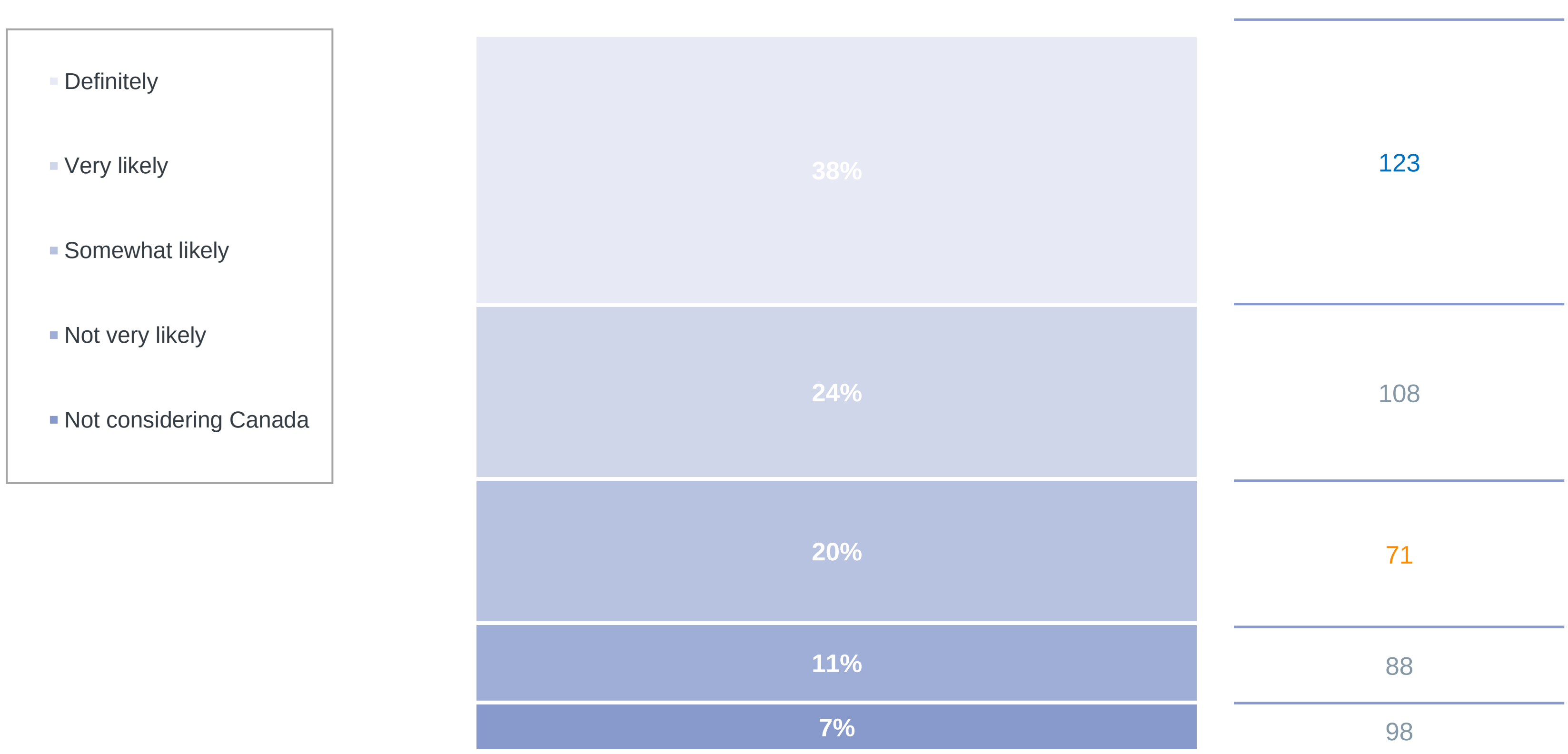
- Our travel experiences have filled us with a broad understanding and deep appreciation of Canada's varied landscapes.
- We expect to venture outside of our home province within the next two years.
- We want to discover the hidden gems of Canada.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	**SPRING** (Mar-May)	**SUMMER** (Jun-Aug)	**AUTUMN** (Sept-Nov)
CULTURE SEEKERS	**12%**	**14%**	**50%**	**26%**
VS. TOTAL MARKET	7%	12%	54%	29%

LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS

INDEX



CULTURE SEEKERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- We primarily spend our money on leisure travel and experiences.
- In the last 5 years, we have purchased a new car, and some of us have also invested in home renovations and career changes.

MAJOR LIFE EVENTS IN LAST 5 YEARS

4%
Had a child
95 INDEX SCORE

32%
Started a new job / career
116 INDEX SCORE

12%
Bought a new home
94 INDEX SCORE

18%
Moved to a new city
112 INDEX SCORE

4%
Child started school
95 INDEX SCORE

35%
Purchased a car
76 INDEX SCORE

10%
Retired
96 INDEX SCORE

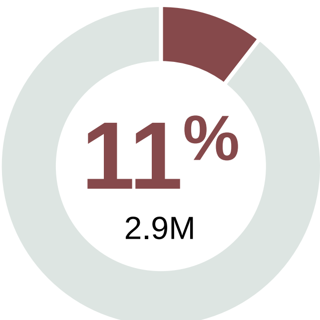
24%
Renovated house
82 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	55%	92
Savings and investments	48%	84
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	45%	117
Experiences (e.g., concerts, events).	39%	128
Personal care and wellness	36%	84
Technology and gadgets	22%	117

REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



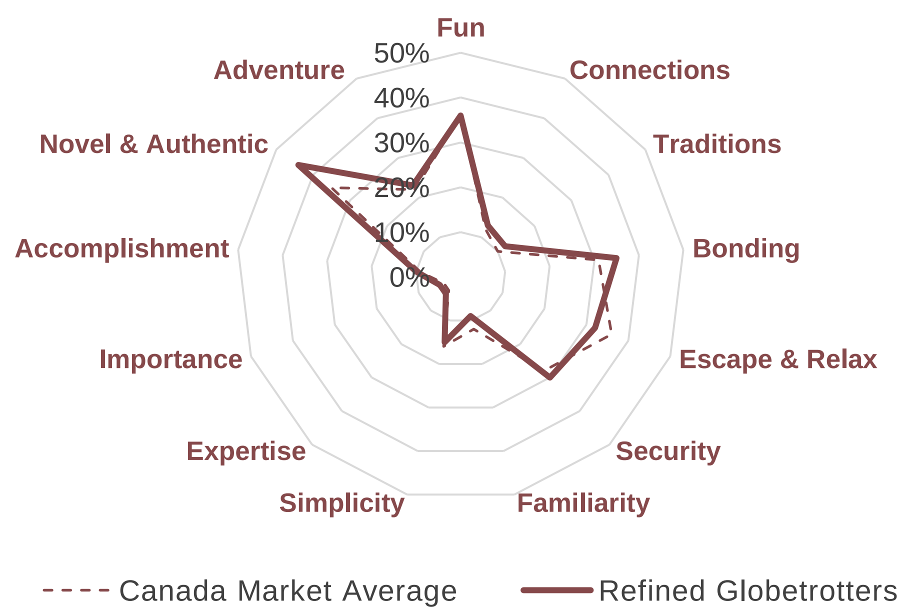
% OF CANADA POPULATION

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

147

How is this calculated?

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

REFINED GLOBETROTTERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer booking flights and accommodations well in advance	84%	143
I'm always on the look out for new destinations to visit next	83%	126
Exploring the world through travel is an important milestone of growing up	83%	119
I like to come back from travels having learnt something new	82%	121
I prefer destinations with well-established tourist infrastructure	78%	128
I'm passionate about travelling	72%	119
I make sure to visit the "famous" sites wherever I go	63%	131
I enjoy joining guided tours to explore new destinations	55%	155
While I think about value for money, it doesn't tend to influence my choice of destination	54%	132
I seek travel advice from travel agencies and agents	48%	147
Luxury experiences are an important part of travel	48%	148
When traveling, I expect 24 / 7 support from a travel provider	36%	150
I seek out fine dining experiences and gourmet cuisine when I travel	32%	135

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	60%	141
To feel safe and secure	45%	118
To have authentic experiences	39%	113
To open my mind to new perspectives	32%	115
To bond through shared experiences	31%	122
To be proud to share my travel experiences	24%	114

DESIRED DESTINATION

	SCORE	INDEX
Authentic	45%	118
Charming	36%	152
Luxurious	30%	155
Unique	29%	115
World-Class	25%	154
Exclusive	18%	154

REFINED GLOBETROTTERS

OUR DEMOGRAPHICS

AGE

	SCORE	INDEX
18-34	19%	84
35-54	30%	94
55+	51%	114
MEAN YEARS	52.5	116

HH INCOME (CAD)

	SCORE	INDEX
Less than $40K	10%	53
$40K to <$120K	70%	131
$120K or more	16%	147
Refused	4%	107

EMPLOYMENT

	SCORE	INDEX
Employed FT	48%	96
Employed PT	5%	62
Self-employed	4%	78
Retired	36%	117

EDUCATION

	SCORE	INDEX
Primary education or less	0%	18
Secondary education	18%	79
Post-secondary education	81%	120

IMMIGRATION STATUS

	SCORE	INDEX
Non-immigrant	73%	92
Recent immigrant (<5y)	4%	92
Non-recent immigrant (5+y)	22%	116

87%
134 Have a valid passport

GENDER

53% 103 Male

48% 98 Female

0% 86 Non-binary / Other

HOUSEHOLD

17% 94 Children <18 Living At Home*

8% 96 Children 18+ Living At Home*

32% 115 Children NOT Living At Home*

51% 101 No Children

** Option is not exclusive*

CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	45%	134
Quebec	24%	111
British Columbia	13%	68
Alberta	9%	72
Manitoba	4%	88
Saskatchewan	2%	90
Nova Scotia	2%	98
New Brunswick	1%	79
Newfoundland and Labrador	1%	90
Prince Edward Island	0%	81

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

150

TRAVEL TRADE INDEX: **GROUP**

145

KEY terminology on this page

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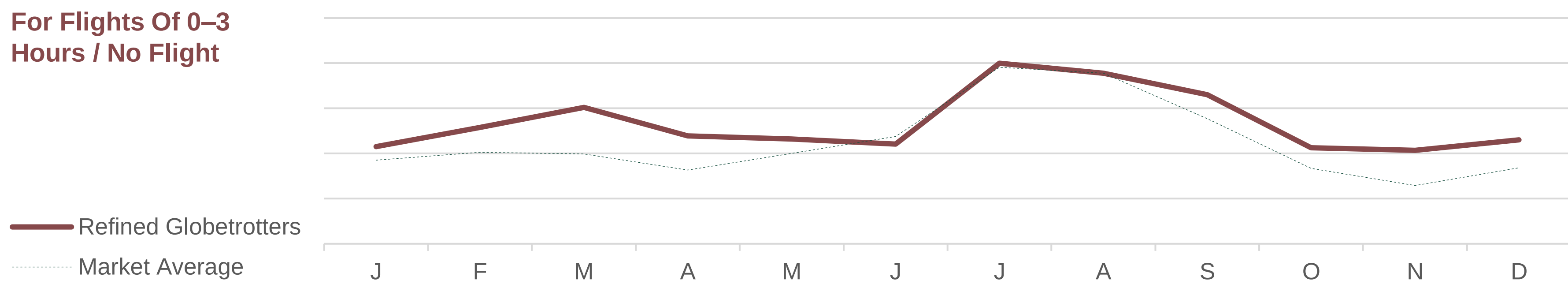
- **TRAVEL TRADE INDEX – GROUP –** The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip.

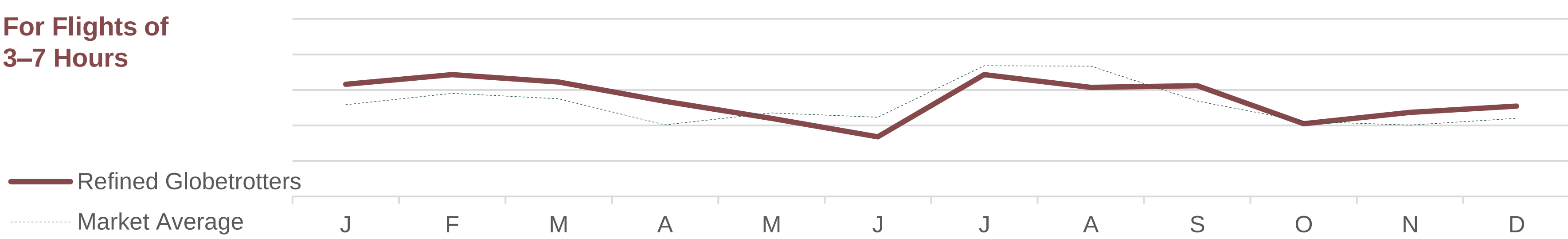
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	35%	107
3-5 Days	19%	104
1 Week Holiday	17%	128
2 Weeks Holiday	14%	129
3 Weeks Or More	7%	125

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	37%	116
International Leisure	28%	147
Business Trip	9%	109
Added Personal To Business	7%	118
Worked During Vacation	5%	117

Incidence is frequency of 2+ times per year

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	41%	69
Premium Hotel	31%	144
All-inclusive resort	27%	148
Cruise ship	20%	147
Friend's or family's place	19%	65
Vacation Rental (e.g., Airbnb, Vrbo)	14%	69

THOUGHTS ON INDIGENOUS TRAVEL

46%

101 INDEX SCORE

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

8%

102 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%	125
You only ever get to know a country by experiencing its culture	82%	130
I'm willing to put in the effort while travelling in order to see lesser-known places	47%	97
I like to explore places that are off the beaten path and less explored	44%	91
I'm open to travelling to destinations with limited tourist infrastructure	22%	72
I'm open to visiting destinations with challenging climates or weather conditions	20%	90

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	74%	124
Adult relatives	17%	67
Friends	12%	91
Solo	11%	87
Kids	10%	93

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,890

139
INDEX SCORE

SPEND STYLE

Premium to High-end Luxury

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	56%	105
I consider the impact that I personally have on the destinations I visit	48%	104
It's important to me that I visit somewhere that is open to diversity and inclusion	43%	96
Hearing from underrepresented communities is an important part of travelling	33%	95
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	28%	94

35%

PRIORITIZE SUSTAINABLE TRAVEL

102 INDEX SCORE

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

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

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	66%	135
○ Museums	47%	136
○ Historical or archeological sites	46%	145
○ Visiting local monuments	39%	143
Local cuisine	62%	126
○ Local restaurants	51%	123
○ Luxury dining	25%	148
Guided tours	54%	148
○ City tours	42%	147
○ Wildlife or nature tours	28%	141
Overnight experiences	30%	142
○ Cruise	20%	149
○ Staying at all-inclusive resort	11%	109
Health and wellness	29%	151
○ Spas	21%	148
○ Sauna or steam bath	13%	148
Nature experiences	38%	86
Shopping	38%	101
Festivals and events	20%	77
Family-focused attractions	20%	90
Casual sports	11%	66
Nightlife	10%	88
Water-based sports	9%	87

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%	85	66%	108
To escape from routine	39%	85	44%	99
To spend time with family	38%	92	32%	93
To learn through other cultures	32%	118	33%	107
To check off dream travel places	28%	132	34%	138
For adventure and excitement	23%	89	16%	78
To have fun with friends	20%	84	13%	75
For a romantic getaway	17%	150	19%	135
To be pampered	15%	134	18%	120

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	58%	121	55%	112
Visiting friends / family	32%	57	26%	79
Family / friends wanted to go	27%	81	21%	57
Special event (e.g., wedding, reunion)	20%	76	18%	79
Kids wanted to go	14%	97	12%	96
Festival or event	10%	72	10%	75

15% 94 INDEX SCORE

Travel aligns with children's school schedule

23% 101 INDEX SCORE

Take time off for vacation during major holidays

13% 87 INDEX SCORE

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

REFINED GLOBETROTTERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

49%

Primary Trip Planner

75
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 – 4.8 Months** ○ Travel agents
Started Researching and Planning – 3.4 months ○ Recommendations from friends or family **Booked Accommodation – 2.4 months** ○ Direct with company ○ Travel booking sites / apps **Booked Transportation – 2.3 months** ○ Through a travel agent	**4 MONTHS** BEFORE MY TRIP	**Booked Transportation – 3.5 months** ○ Through a travel agent **Booked Accommodation – 3.4 months** ○ Travel booking sites / apps
	3 MONTHS BEFORE MY TRIP	
Booked Activities – 1.9 months ○ Direct with company	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 2.1 months** ○ Travel booking sites / apps
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- On our top trips, we explore cities, visit spas, and seek luxury experiences.
- We also take trips like Simplicity Lovers or City Trippers.

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

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

% OF TOTAL TRIPS

54% 150 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban Centre		**19%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Bonding
ACTIVITIES	Local restaurants		**44%**
	Historical / archeological sites		**24%**
	City tours		**21%**
KEY BEHAVIOURS	Mid-range budget, most likely to be a cruise		

% OF TOTAL TRIPS

11% 120 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Luxury Resort		
COMPANIONS	Couple Only		**63%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Luxury dining		**25%**
	Sauna or steam bath		**19%**
	Oceanside beaches		**15%**
KEY BEHAVIOURS	Relaxed but luxurious romantic getaway		

% OF TOTAL TRIPS

14% 133 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Beach Resort		
COMPANIONS	Extended Family		**35%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Security
ACTIVITIES	Local restaurants		**37%**
	Oceanside beaches		**21%**
	Souvenir shopping		**20%**
KEY BEHAVIOURS	All-inclusive trip with extended family. No surprises, easy vacation		

% OF TOTAL TRIPS

20% 162 INDEX SCORE

SEGMENT ALIGNMENT

● ● ○ ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only		**33%**
	Alone		**30%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants		**50%**
	Museums		**34%**
	Music concerts or festivals		**14%**
KEY BEHAVIOURS	Visiting friends, exploring the hustle bustle of a city		

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We enjoy exploring well-known and developed destinations through curated experiences.
- Our future plans include Europe, Japan, and cruises which help us explore new places.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Canada	20%	62
US	20%	79
Mexico	8%	145
France	5%	124
Italy	5%	123

	SCORE	INDEX
Dominican Republic	5%	146
UK	4%	120
Portugal	3%	139
Bahamas	3%	142
Japan	3%	134

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	46%	131
Known for stunning natural landscapes	40%	124
Has a variety of museums and / or historical sites	39%	139
Has famous attractions	36%	134
Renowned for food and drink experiences	36%	129
Offers all-inclusive resort packages	34%	140
Has luxury dining, shopping, and accommodations	30%	152
Has well-developed tourism infrastructure	21%	135

REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

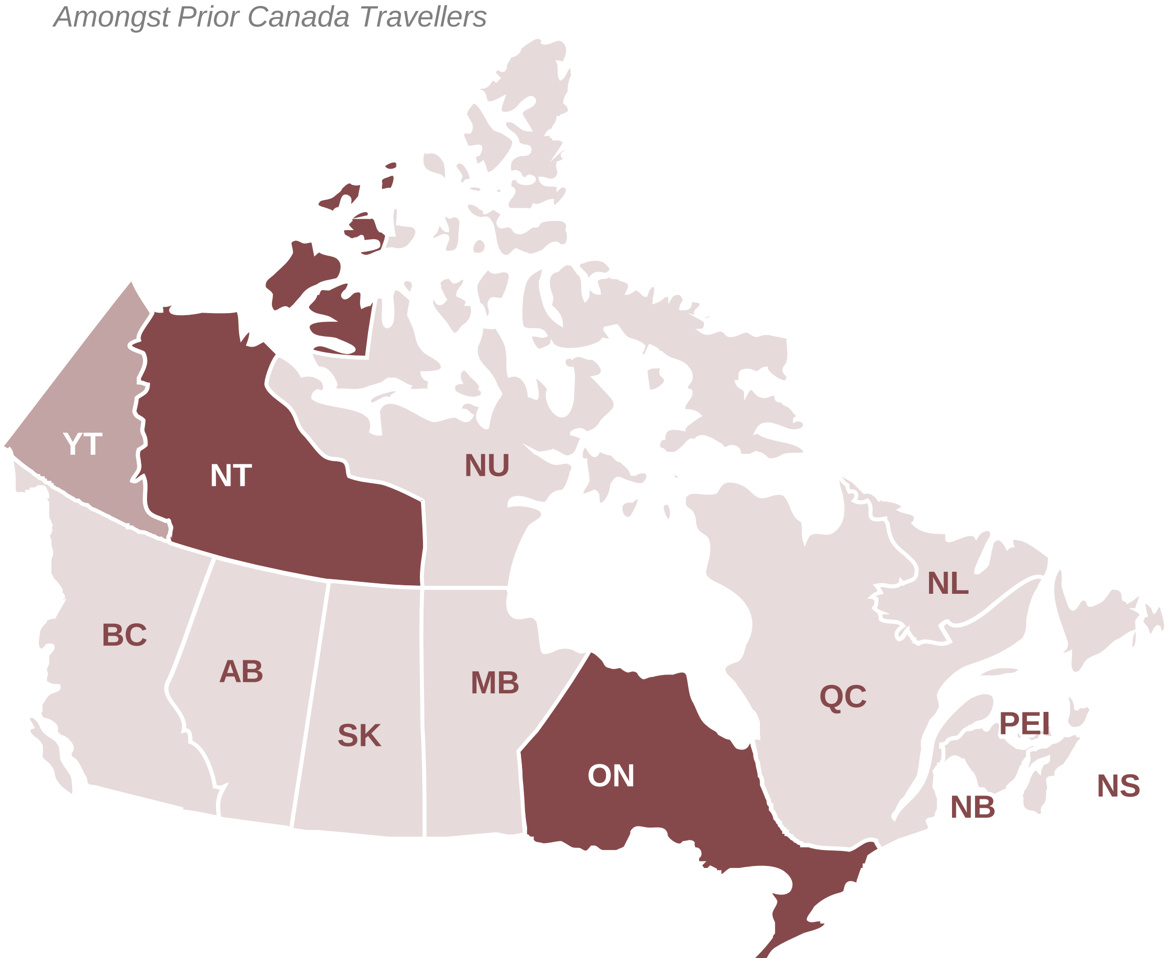
OVERALL INSIGHT

- We are generally well-travelled within Canada.
- We have visited a mix of large cities as well as destinations such as the Muskoka's and Niagara (likely wineries).
- The next places we would like to explore in Canada are British Columbia, Nova Scotia and Quebec.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	12%	77
BC	18%	86
MB	3%	78
NB	4%	80
NL	2%	98
NS	5%	87
NT	1%	125
NU	0%	78
ON	42%	140
PEI	2%	72
QC	21%	94
SK	3%	104
YT	1%	115

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

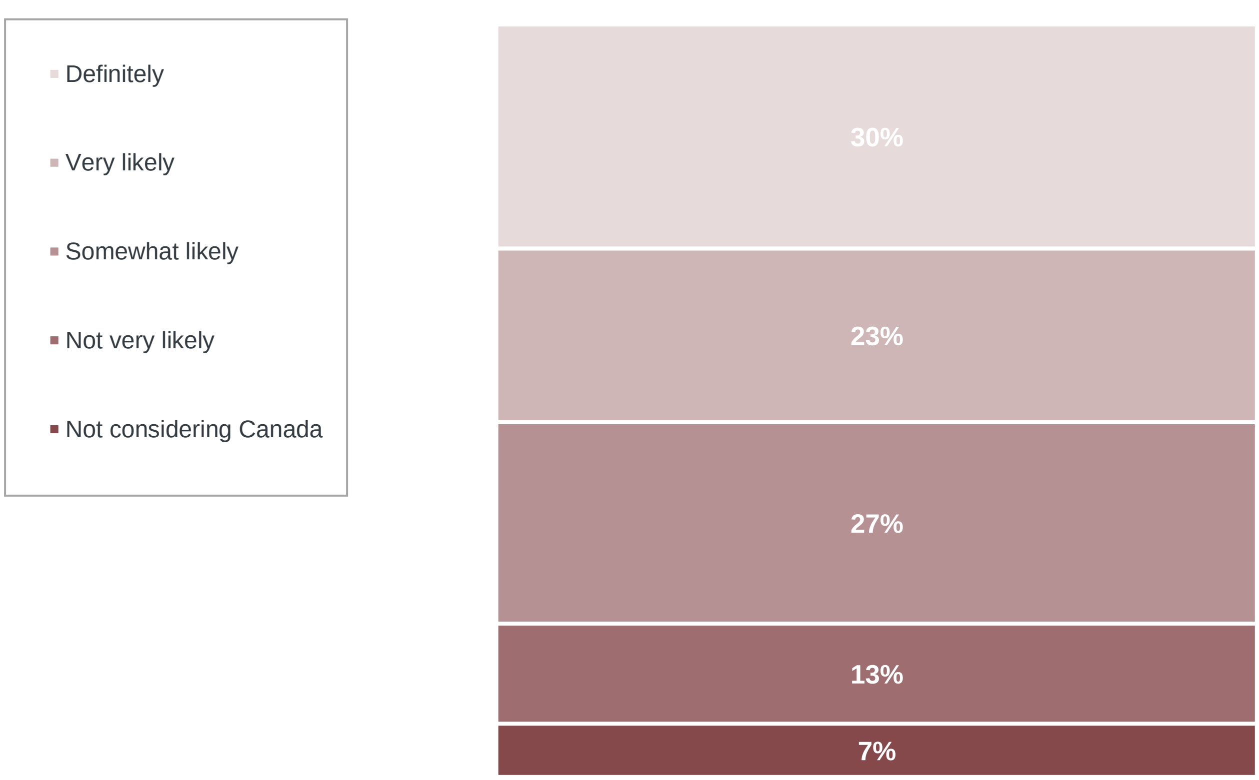
OVERALL INSIGHT

- We have visited Canada in spring, summer, and fall, and have the freedom to travel in any season.
- We are happy with past trips within Canada, and will likely explore again in the future.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	**6%***	**14%**	**54%**	**32%**
VS. TOTAL MARKET	7%	12%	54%	29%

LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS



	INDEX
30%	93
23%	94
27%	110
13%	106
7%	100

*Data point is associated with a small base size.
Results may not be representative and should be interpreted with caution.

REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

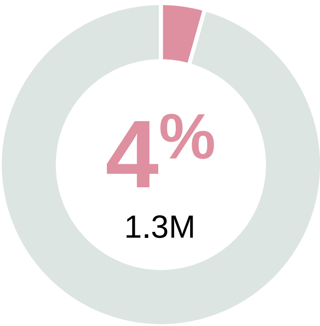
4%	Had a child	95 INDEX SCORE
24%	Started a new job / career	83 INDEX SCORE
12%	Bought a new home	91 INDEX SCORE
13%	Moved to a new city	77 INDEX SCORE
4%	Child started school	96 INDEX SCORE
44%	Purchased a car	121 INDEX SCORE
13%	Retired	110 INDEX SCORE
29%	Renovated house	134 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	75%	149
Savings and investments	52%	102
Personal care and wellness	38%	92
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	31%	52
Experiences (e.g., concerts, events).	30%	83
Fashion and accessories	21%	108

PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



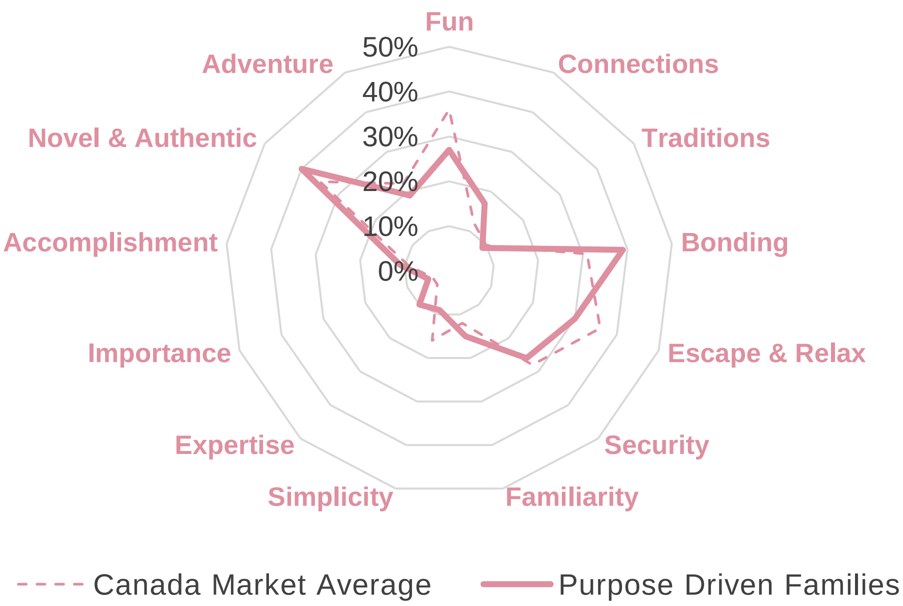
% OF CANADA POPULATION

We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish trendy destinations, hidden gems that support local cultures, and anywhere that lets us spend time in nature. Travel is both a shared accomplishment and a personal journey of learning for the entire family. Cost or difficulty aren't big deterrents; we seek socially responsible, impressive, new experiences.

WHAT YOU NEED TO KNOW ABOUT ME

1. We take pride in our destination choices, and the effort it takes to reach some destinations.
2. Being trendy for us includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.
3. We value being able to provide these experiences to our children, but we also appreciate how it allows us to demonstrate our success to others.
4. Exposure to nature, exploring the outdoors, and immersing in culture are all primary needs.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

125

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

115

How is this calculated?

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

PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	**80%**	113
I like to come back from travels having learnt something new	**78%**	113
I am more likely to select destinations / activities that invest in socially responsible tourism	**67%**	133
I generally think natural attractions are the highlights of my trip	**62%**	121
Videos and pictures on social media inspire me to travel	**51%**	135
Even while travelling, I like to maintain regular contact with my duties or obligations back home	**46%**	155
I seek out destinations where I can explore my ancestral heritage	**46%**	146
I love posting my trips on social media to share with friends	**45%**	120
When there's a lot of positive buzz about a destination it makes me want to visit it more	**45%**	132
I'm open to unconventional accommodations when travelling	**36%**	110
Luxury experiences are an important part of travel	**36%**	123
I seek travel advice from travel agencies and agents	**35%**	117
I'd be open to using AI-powered chatbots for travel planning and assistance	**32%**	131

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	**44%**	112
To bond through shared experiences	**35%**	135
To be familiar with my surroundings	**17%**	116
To feel connected with new people	**17%**	114
To push my limits and challenge myself	**12%**	117
To feel like a travel expert	**10%**	143

DESIRED DESTINATION

	SCORE	INDEX
Caring	**27%**	152
Passionate	**19%**	137
Free-Spirited	**16%**	117
Luxurious	**13%**	110
World-Class	**12%**	112
Unexplored	**12%**	116

PURPOSE DRIVEN FAMILIES

OUR DEMOGRAPHICS

AGE

	SCORE	INDEX
18-34	**45%**	136
35-54	**51%**	126
55+	**4%**	60
MEAN YEARS	**37.2**	59

HH INCOME (CAD)

	SCORE	INDEX
Less than $40K	**17%**	85
$40K to <$120K	**69%**	122
$120K or more	**11%**	115
Refused	**3%**	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	**70%**	140
Employed PT	**10%**	141
Self-employed	**4%**	82
Retired	**2%**	61

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	18
Secondary education	**18%**	75
Post-secondary education	**83%**	127

IMMIGRATION STATUS

	SCORE	INDEX
Non-immigrant	**58%**	46
Recent immigrant (<5y)	**12%**	152
Non-recent immigrant (5+y)	**30%**	149

73%
103 Have a valid passport

GENDER

62% 133 Male

38% 69 Female

0% 86 Non-binary / Other

HOUSEHOLD

86% 143 Children <18 Living At Home*

3% 47 Children 18+ Living At Home*

1% 60 Children NOT Living At Home*

13% 61 No Children

** Option is not exclusive*

CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	**41%**	105
Quebec	**25%**	119
Alberta	**13%**	121
British Columbia	**13%**	67
Saskatchewan	**4%**	112
Manitoba	**3%**	67
Newfoundland and Labrador	**1%**	103
Prince Edward Island	**1%**	134
New Brunswick	**0%**	58
Nova Scotia	**0%**	52

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

97

TRAVEL TRADE INDEX: **GROUP**

102

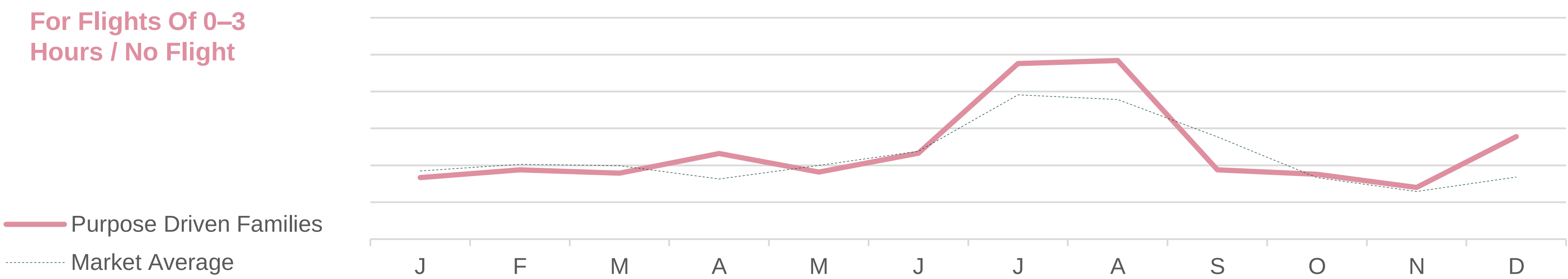
KEY terminology on this page

- **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.

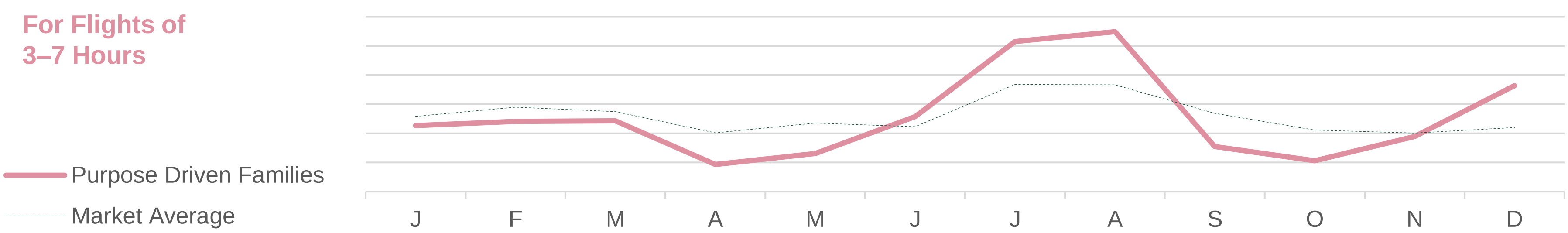
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	33%	74
3-5 Days	16%	76
1 Week Holiday	18%	132
2 Weeks Holiday	10%	104
3 Weeks Or More	4%	94

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	41%	138
International Leisure	15%	94
Business Trip	14%	139
Added Personal To Business	9%	140
Worked During Vacation	6%	128

Incidence is frequency of 2+ times per year

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**56%**	131
Friend's or family's place	**24%**	91
Vacation Rental (e.g., Airbnb, Vrbo)	**22%**	116
Premium Hotel	**19%**	99
Budget Hotel	**17%**	122
All-inclusive resort	**13%**	81

THOUGHTS ON INDIGENOUS TRAVEL

63%

128 INDEX SCORE

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

11%

120 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	**79%**	119
You only ever get to know a country by experiencing its culture	**74%**	108
I'm willing to put in the effort while travelling in order to see lesser-known places	**55%**	109
I like to explore places that are off the beaten path and less explored	**54%**	105
I'm open to travelling to destinations with limited tourist infrastructure	**35%**	96
I'm open to visiting destinations with challenging climates or weather conditions	**31%**	113

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	73%	121
Kids	67%	140
Adult relatives	21%	97
Solo	10%	84
Friends	5%	59

BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,440

126
INDEX SCORE

SPEND STYLE

Mid-range to Premium

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	65%	132
Hearing from underrepresented communities is an important part of travelling	59%	131
It's important for me to know that the money I spend will support the local economy I'm visiting	59%	111
I consider the impact that I personally have on the destinations I visit	55%	119
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	44%	127

49%

PRIORITIZE SUSTAINABLE TRAVEL

130 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 outdoors, finding beaches, lakes, and outdoor sports to try.
- Exposing our kids to local culture, festivals, and events is important.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	58%	129
○ Zoos or aquariums	42%	130
○ Amusement parks or theme parks	39%	122
○ Space or science centres	30%	144
Nature experiences	54%	117
○ Oceanside beaches	29%	119
○ See or explore lakes, rivers, or waterfalls	28%	118
Water-based sports	19%	121
○ Swimming	14%	126
○ Kayaking, canoeing, or paddle-boarding	9%	113
Winter-based sports	12%	121
○ Snowboarding or downhill skiing	6%	108
○ Ice skating or hockey	5%	133
High-intensity sports	9%	130
○ Rock climbing	5%	144
○ Bungee jumping or skydiving	3%	138
Cultural experiences or attractions	56%	108
Local cuisine	48%	92
Festivals and events	35%	108
Shopping	31%	89
Guided tours	21%	74
Overnight experiences	19%	73
Casual sports	17%	105

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	66%	127	67%	139
To relax and unwind	57%	87	59%	91
To escape from routine	42%	92	38%	84
For adventure and excitement	34%	110	23%	88
To learn through other cultures	25%	105	41%	122
To have fun with friends	17%	71	14%	77
To check off dream travel places	15%	77	23%	99
For a romantic getaway	12%	103	4%	60
To seek solitude and isolation	8%	103	2%	76

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	59%	123	69%	148
Kids wanted to go	51%	139	49%	141
Visiting friends / family	43%	113	49%	148
Family / friends wanted to go	40%	119	36%	120
Special event (e.g., wedding, reunion)	38%	146	27%	126
Festival or event	24%	109	24%	115

54% 141 INDEX SCORE

Travel aligns with children's school schedule

46% 158 INDEX SCORE

Take time off for vacation during major holidays

22% 151 INDEX SCORE

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

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

60%

Primary Trip Planner

109
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 – 3.7 Months** ○ Official tourism websites
Started Researching and Planning – 2.4 months ○ Travel review sites ○ Travel agents	**3 MONTHS** BEFORE MY TRIP	**Booked Transportation – 2.8 months** ○ Travel booking sites / apps **Booked Accommodation – 2.6 months** ○ Travel booking sites / apps
	2 MONTHS BEFORE MY TRIP	
Booked Accommodation – 1.7 months ○ Travel booking sites / apps **Booked Transportation – 1.3 months** ○ Travel booking sites / apps **Booked Activities – 1 month** ○ Direct with company	**1 MONTH** BEFORE MY TRIP	**Booked Activities – 1.3 months** ○ Direct with company
	MY TRIP BEGINS!	
	DURING MY TRIP	

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- On our top trips, we explore new places and experience new foods and activities.
- We also take trips like Culture Seekers or Fun & Sun Families.

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

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

% OF TOTAL TRIPS: 13% — 129 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ● ●

TRIP TYPE	Cultural Experience		
COMPANIONS	Nuclear Family With Kids	54%	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Novel & Authentic
ACTIVITIES	Art galleries	34%	
	Historical / archeological sites	33%	
	Nature parks / preserves	27%	
KEY BEHAVIOURS	Getting out in nature, immersing family in a new culture. Planning in advance for this		

% OF TOTAL TRIPS: 6% — 99 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ● ●

TRIP TYPE	Adventure Destination		
COMPANIONS	Nuclear Family With Kids	61%	
	Extended Family	24%	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Adventure	Security
ACTIVITIES	Amusement parks / theme parks	47%	
	Local restaurants	44%	
	Nature parks / preserves	22%	
KEY BEHAVIOURS	Seeking world-class attractions, planning a little more last minute		

% OF TOTAL TRIPS: 21% — 168 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only	33%	
	Alone	30%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants	50%	
	Museums	34%	
	Famous shopping centres / areas	28%	
KEY BEHAVIOURS	Planned in advance, spending more, visiting friends, and exploring a new culture		

% OF TOTAL TRIPS: 11% — 121 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ○ ○ ○

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear Family With Kids	46%	
	Extended Family	27%	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Swimming	30%	
	Oceanside beaches	26%	
	Local restaurants	21%	
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 kid-friendly access to nature and new cultural experiences.
- Most of our travel is in North America, but we venture further to Europe or Asian countries for the bigger trips.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Canada	**30%**	96	Greece	**3%**	143
US	**22%**	91	Italy	**3%**	87
Mexico	**7%**	104	UK	**2%**	88
France	**5%**	110	Australia	**2%**	150
India	**4%**	152	Belgium	**2%**	143

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	**83%**	145
Has a rich cultural and historical heritage	**35%**	112
Offers natural landscapes in close proximity to city amenities	**29%**	141
Is inclusive and tolerant	**24%**	120
Provides a variety of local festivals and events	**19%**	120
Offers an energetic and dynamic cultural scene	**12%**	108
Has a thriving arts and music scene	**10%**	107
Offers options for adrenaline seekers	**7%**	119

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

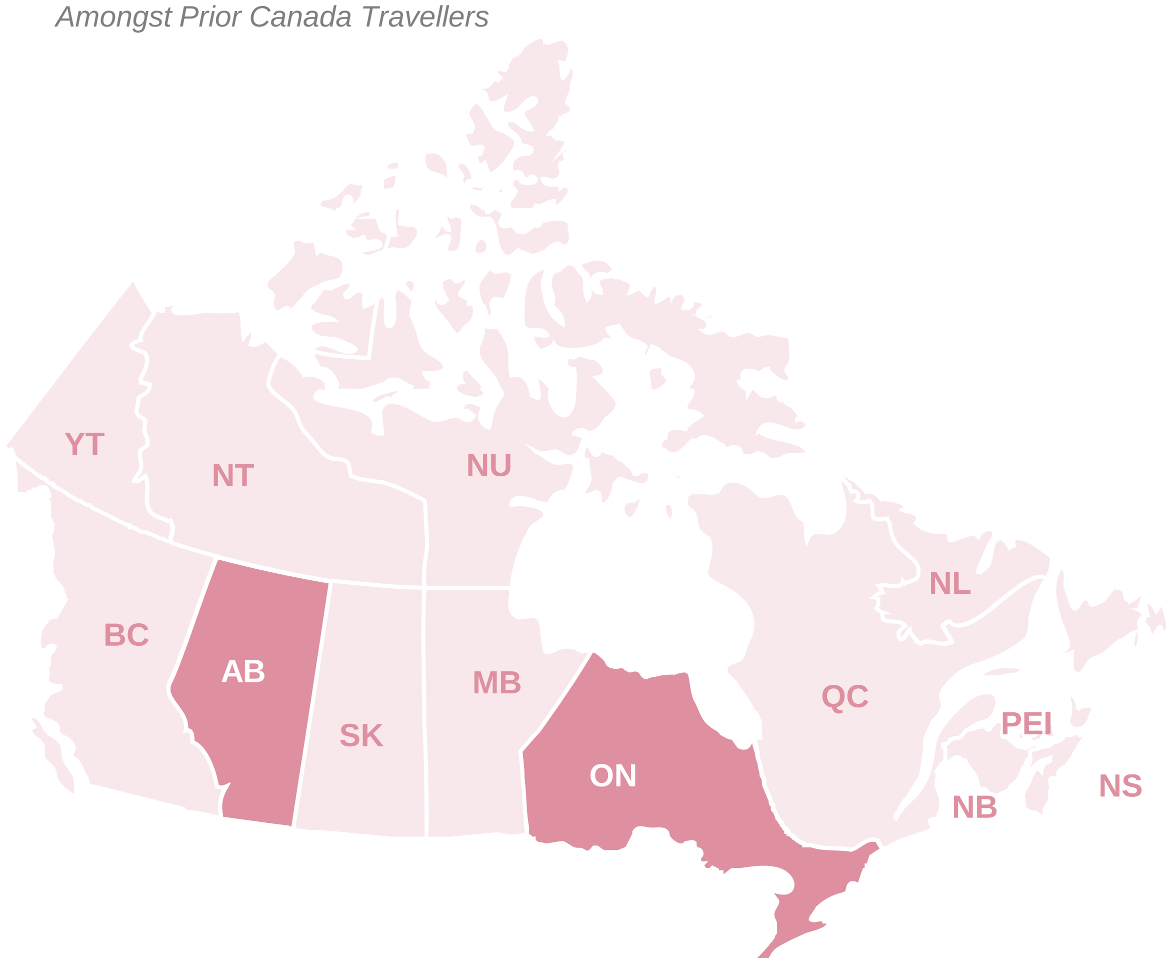
OVERALL INSIGHT

- We often travel domestically within Canada.
- We have explored a number of the big cities in Canada, but we have also ventured off the beaten path to more remote destinations.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	18%	139
BC	16%	58
MB	3%	78
NB	3%	56
NL	0%	62
NS	2%	59
NT	0%	85
NU	0%	78
ON	41%	136
PEI	3%	109
QC	17%	66
SK	1%	62
YT	0%	76

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

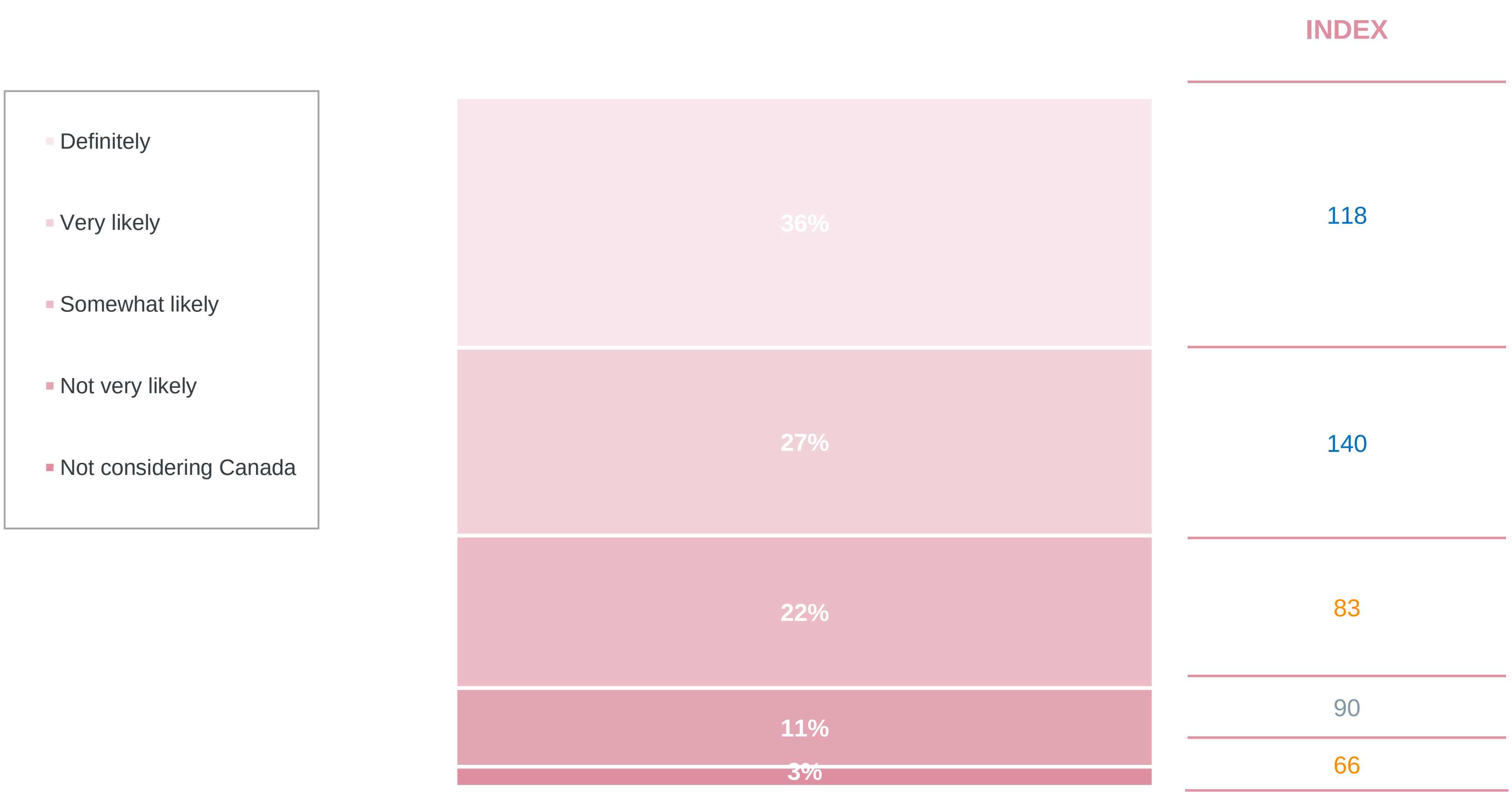
OVERALL INSIGHT

- Most of our travel is aligned to our kids' school schedule, so you will see us in summer or during winter breaks.
- We definitely have plans to travel outside our province soon.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	**4%***	**10%***	**64%**	**23%**
VS. TOTAL MARKET	7%	12%	54%	29%

LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS



*Data point is associated with a small base size.
Results may not be representative and should be interpreted with caution.

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- We are in a busy time of life, with many changes happening. Changing careers, homes, and vehicles all take up our time and finances.
- We are also focused 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

32%
Had a child
151 INDEX SCORE

31%
Started a new job / career
112 INDEX SCORE

26%
Bought a new home
151 INDEX SCORE

21%
Moved to a new city
133 INDEX SCORE

32%
Child started school
148 INDEX SCORE

44%
Purchased a car
122 INDEX SCORE

1%
Retired
56 INDEX SCORE

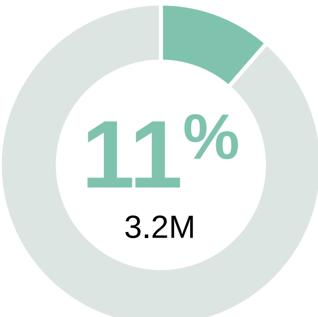
26%
Renovated house
103 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	63%	151
Travel	50%	80
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	44%	112
Personal care and wellness	38%	92
Experiences (e.g., concerts, events).	29%	79
Technology and gadgets	27%	147

CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



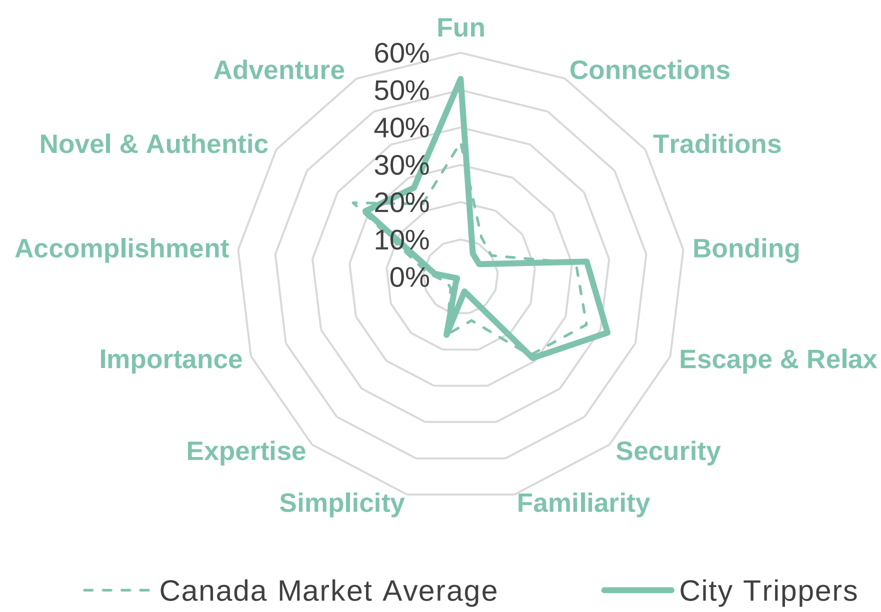
% OF CANADA POPULATION

We are independent, sociable, and trendy travellers who prioritize having fun, indulging, and living in the moment. We prefer trendy, friendly locations with a variety of activities and distractions, valuing safety and ease of travel. We relish vibrant nightlife, cultural experiences, and sharing our adventures with others. Our travel decisions focus on enjoying ourselves and creating memorable experiences with friends and loved ones.

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize fun and social settings and seek experiences that are worth sharing on social media.
2. We like the freedom to explore without an agenda, and disconnect from everyday life.
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 like to see and do as much as possible in busy and vibrant destination.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

82

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

85

How is this calculated?

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

CITY TRIPPERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We select destinations that offer a fun, social setting, allowing us to fully indulge and live in the moment.
- We seek experiences that we can be proud of, and that we look forward to sharing with others.
- Busy destinations with lots to see and provide a welcome atmosphere.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	88%	144
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	80%	122
I generally don't go out of my way to seek out perspectives from underrepresented communities	78%	121
I generally stick to the most popular areas when I visit somewhere	68%	125
I enjoy the freedom of exploring new destinations without guided tours	67%	115
I generally don't think much on the impact that I personally have on the destinations I visit	65%	125
While travelling I generally stick to places that are direct and convenient to get to	63%	117
I like natural attractions but I don't usually think they are the highlights of my trip	62%	125
Videos and pictures on social media inspire me to travel	47%	123
I love posting my trips on social media to share with friends	46%	121
I'm more interested in the present and don't focus much on the history of where I visit	44%	121
When there's a lot of positive buzz about a destination it makes me want to visit it more	40%	120
I prefer to explore quickly and cover as much ground as possible at historic sites or museums	33%	122

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	74%	131
To indulge myself and live in the moment	52%	151
To share quality time with others	46%	115
To have a fun, social setting	41%	149
To let loose and forget about day-to-day life	41%	135
To be proud to share my travel experiences	28%	129

DESIRED DESTINATION

	SCORE	INDEX
Fun	77%	140
Friendly	66%	124
Sociable	27%	134
Carefree	16%	111
Trendy	14%	149
Free-Spirited	10%	90

CITY TRIPPERS

OUR DEMOGRAPHICS

AGE

	SCORE	INDEX
18-34	**33%**	112
35-54	**29%**	92
55+	**38%**	99
MEAN YEARS	**47.1**	96

HH INCOME (CAD)

	SCORE	INDEX
Less than $40K	**27%**	128
$40K to <$120K	**63%**	68
$120K or more	**6%**	75
Refused	**5%**	124

68%

92 Have a valid passport

GENDER

45% 78 Male

55% 123 Female

0% 86 Non-binary / Other

EMPLOYMENT

	SCORE	INDEX
Employed FT	**50%**	100
Employed PT	**9%**	118
Self-employed	**5%**	93
Retired	**22%**	95

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	18
Secondary education	**28%**	119
Post-secondary education	**71%**	81

HOUSEHOLD

13% 91 Children <18 Living At Home*

9% 107 Children 18+ Living At Home*

22% 96 Children NOT Living At Home*

65% 115 No Children

** Option is not exclusive*

IMMIGRATION STATUS

	SCORE	INDEX
Non-immigrant	**83%**	121
Recent immigrant (<5y)	**4%**	96
Non-recent immigrant (5+y)	**13%**	73

CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	**40%**	103
Quebec	**18%**	76
British Columbia	**15%**	100
Alberta	**11%**	96
Manitoba	**5%**	130

	SCORE	INDEX
New Brunswick	**4%**	134
Saskatchewan	**3%**	107
Nova Scotia	**2%**	95
Newfoundland and Labrador	**2%**	117
Prince Edward Island	**1%**	115

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

85

TRAVEL TRADE INDEX: **GROUP**

87

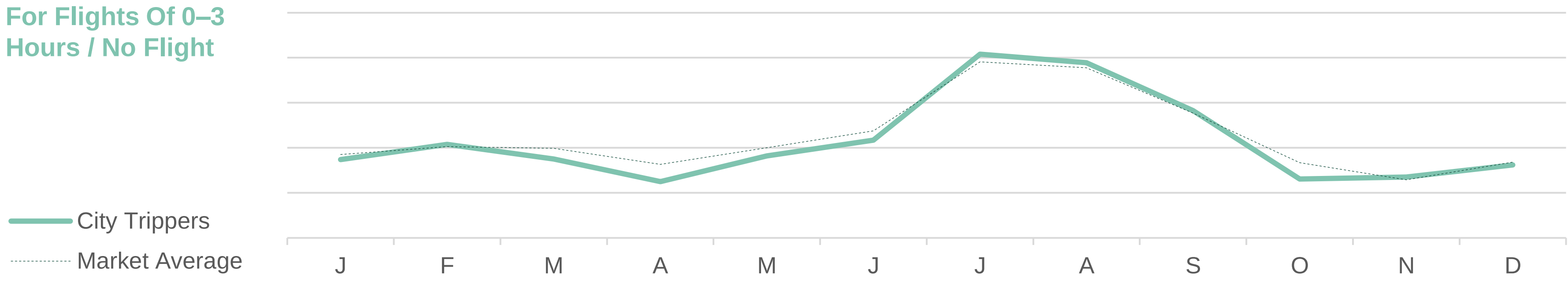
KEY terminology on this page

- **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.

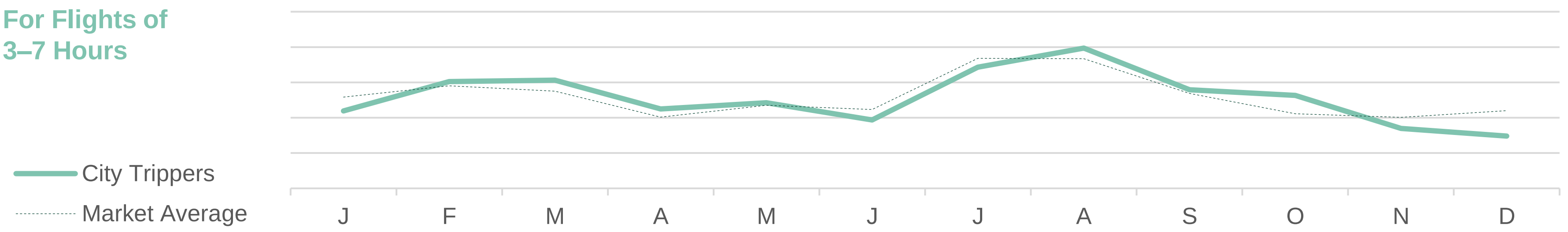
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	36%	120
3-5 Days	20%	114
1 Week Holiday	10%	90
2 Weeks Holiday	6%	87
3 Weeks Or More	2%	77

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	36%	106
International Leisure	15%	94
Business Trip	4%	82
Added Personal To Business	3%	83
Worked During Vacation	2%	79

Incidence is frequency of 2+ times per year

CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	58%	139
Friend's or family's place	28%	115
Vacation Rental (e.g., Airbnb, Vrbo)	22%	113
All-inclusive resort	17%	101
Premium Hotel	14%	77
Budget Hotel	13%	105

THOUGHTS ON INDIGENOUS TRAVEL

32%

80 INDEX SCORE

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

2%

69 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	72%	101
I really want to learn about the history of the destinations I visit	56%	79
I'm willing to put in the effort while travelling in order to see lesser-known places	38%	83
I like to explore places that are off the beaten path and less explored	32%	75
I'm open to travelling to destinations with limited tourist infrastructure	31%	88
I'm open to visiting destinations with challenging climates or weather conditions	16%	83

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	52%	81
Adult relatives	26%	136
Friends	23%	138
Solo	11%	90
Kids	7%	91

BUDGET

AVERAGE SPEND SHORT-HAUL

$1,510 85 INDEX SCORE

AVERAGE SPEND MID-HAUL

$2,060 86 INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	47%	83
It's important to me that I visit somewhere that is open to diversity and inclusion	45%	100
I consider the impact that I personally have on the destinations I visit	35%	75
Hearing from underrepresented communities is an important part of travelling	22%	79
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	20%	78

25%

PRIORITIZE SUSTAINABLE TRAVEL

81 INDEX SCORE

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

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

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	59%	119
○ Local restaurants	50%	119
○ Cafes or bakeries	33%	125
○ Street cuisine	29%	114
Shopping	57%	139
○ Visiting famous shopping centres or areas	36%	140
○ Outdoor markets	34%	143
Cultural experiences or attractions	56%	106
○ Museums	38%	106
○ Historical or archeological sites	32%	99
Festivals and events	47%	135
○ Music concerts or festivals	34%	142
○ Sporting events	18%	143
Nightlife	27%	144
○ Bars and pubs	20%	144
○ Clubs and dancing	12%	138
Family-focused attractions	34%	105
Guided tours	31%	98
Nature experiences	28%	68
Overnight experiences	24%	107
Health and wellness	16%	90
Casual sports	15%	93
Water-based sports	9%	86

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	61%	98	71%	118
To escape from routine	47%	105	51%	114
To spend time with family	44%	99	31%	93
For adventure and excitement	37%	116	35%	107
To have fun with friends	34%	136	38%	147
To check off dream travel places	23%	110	14%	71
To learn through other cultures	17%	90	21%	80
For a romantic getaway	9%	86	15%	114
To have memories from top travel spots	8%	98	7%	85

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Visiting friends / family	47%	133	35%	105
Family / friends wanted to go	47%	140	41%	140
Partner / spouse wanted to go	42%	83	48%	94
Festival or event	27%	119	27%	125
Special event (e.g., wedding, reunion)	26%	99	26%	124
Kids wanted to go	7%	90	8%	92

12% 91 INDEX SCORE

Travel aligns with children's school schedule

21% 95 INDEX SCORE

Take time off for vacation during major holidays

14% 93 INDEX SCORE

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

CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We plan our transportation a few months in advance, but may leave other items a little later.

58%

Primary Trip Planner

102 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 – 3.1 months
- Recommendations from friends or family

Booked Accommodation – 2.2 months
- Direct with company
- Travel booking sites / apps

Booked Transportation – 2 months
- Travel booking sites / apps

Booked Activities – 1.6 months
- Direct with company

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 4.7 Months
- Travel booking sites / apps
- Travel review sites

Booked Transportation – 3.2 months
- Direct with company

Booked Accommodation – 2.9 months
- Travel booking sites / apps

Booked Activities – 1.6 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

CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Most of our trips are focused 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

30% 179 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only		**34%**
	Non-Family Only		**22%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**58%**
	Bars and pubs		**26%**
	Souvenir shopping		**24%**
KEY BEHAVIOURS	A couples trip to visit a city where friends live		

% OF TOTAL TRIPS

19% 104 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Friends Trip		
DESTINATION TYPE	Small Cities & Towns		**11%**
	Cultural Experience		**11%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**52%**
	Bars and pubs		**23%**
	Famous shopping centres / areas		**21%**
KEY BEHAVIOURS	Exploring a new place with friends. All about fun and relaxation		

% OF TOTAL TRIPS

37% 141 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban Centre		**18%**
	Small Cities & Towns		**17%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		**40%**
	Famous shopping centres / areas		**18%**
	Nature walks		**16%**
KEY BEHAVIOURS	Safe and reliable couples getaway to escape and relax		

% OF TOTAL TRIPS

12% 119 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Beach Resort		
COMPANIONS	Extended Family		**35%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Security
ACTIVITIES	Local restaurants		**37%**
	Oceanside beaches		**21%**
	Swimming		**18%**
KEY BEHAVIOURS	All-inclusive trip to unwind with extended family		

CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek destinations that are easy to travel to and around, brimming with activities and distractions.
- Our travel mainly spans across Canada and the US, and also includes Europe, Mexico, and the Caribbean.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Canada	**34%**	110
US	**27%**	116
Mexico	**6%**	100
France	**4%**	105
Italy	**3%**	95

	SCORE	INDEX
UK	**3%**	95
Dominican Republic	**2%**	95
Japan	**2%**	96
Cuba	**2%**	85
Spain	**2%**	89

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is easy to travel around once there	**56%**	133
Is easy to travel to	**47%**	128
Renowned for food and drink experiences	**36%**	128
Language is not a barrier	**34%**	119
Has vibrant nightlife and entertainment	**18%**	141
Provides a variety of local festivals and events	**16%**	111
Provides a bustling and vibrant city vibe	**14%**	119
Is a trendy destination	**12%**	140

CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

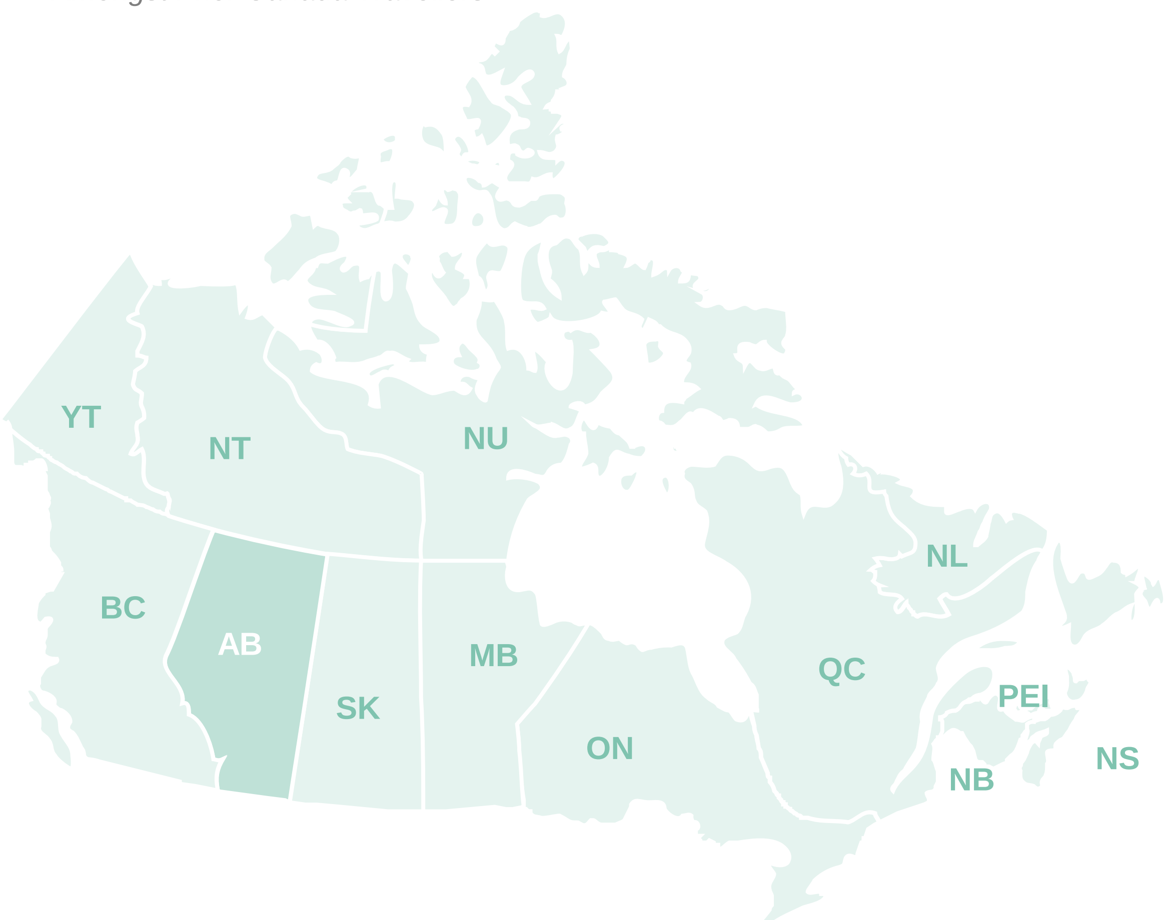
OVERALL INSIGHT

- We have travelled across provinces, with a focus on major cities.
- We have visited landmarks like the Rockies, Banff, Okanagan, and Niagara.
- Our Canadian travels predominantly span Ontario, Quebec, the Prairies, and British Columbia.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	16%	117
BC	20%	108
MB	4%	96
NB	5%	95
NL	1%	76
NS	4%	78
NT	0%	85
NU	0%	78
ON	35%	101
PEI	2%	75
QC	22%	106
SK	3%	104
YT	0%	76

CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Future travel within Canada is likely, especially if there are new and easily accessible experiences we can participate in, though we aren't inclined to focus on winter or sports too much.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	**8%**	**16%**	**47%**	**33%**
VS. TOTAL MARKET	7%	12%	54%	29%

LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS

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

3%
Had a child
94 INDEX SCORE

30%
Started a new job / career
109 INDEX SCORE

13%
Bought a new home
97 INDEX SCORE

17%
Moved to a new city
107 INDEX SCORE

2%
Child started school
92 INDEX SCORE

40%
Purchased a car
101 INDEX SCORE

9%
Retired
93 INDEX SCORE

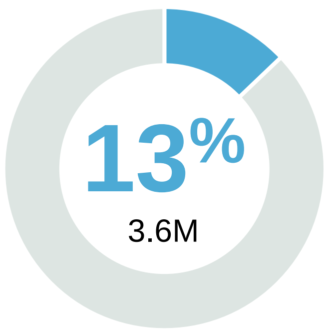
22%
Renovated house
65 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	56%	97
Savings and investments	47%	79
Personal care and wellness	44%	125
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	38%	86
Experiences (e.g., concerts, events).	38%	121
Fashion and accessories	26%	136

SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



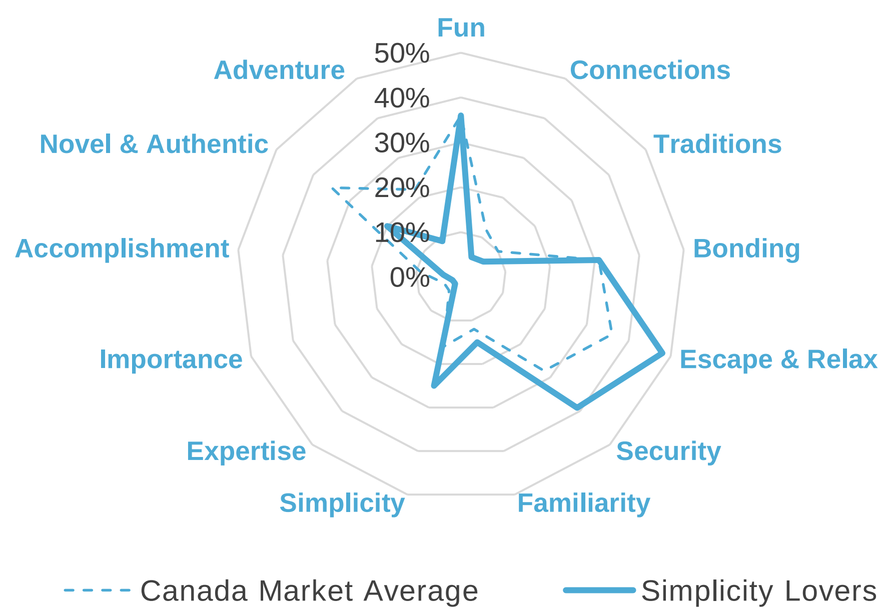
% OF CANADA POPULATION

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. We are not concerned with what's trendy, and won't be active on social media.

WHAT YOU NEED TO KNOW ABOUT ME

1. We seek peace, relaxation, and familiarity in our travels, preferring easy, affordable destinations with a small-town feel.
2. We like to take it slow, with low impact activities. We don't prioritize fitting in physical activity during our trips.
3. Loyal to regular destinations, we are creatures of habit who favor simplicity and serenity over glitz, glamour, and cultural immersion.
4. Hard-to-reach destinations don't attract us, we want ease of access and don't want to worry about how to navigate once we arrive.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

76

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

69

How is this calculated?

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

SIMPLICITY LOVERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally only choose destinations with comfortable climate and weather conditions	**89%**	129
Quiet, relaxed experiences are how I take care of myself on vacation	**88%**	146
I don't generally seek out luxury experiences while travelling	**87%**	126
I generally avoid places that are challenging or difficult to reach	**83%**	133
I don't see the point of posting about my trips on social media	**83%**	148
Generally I'm not influenced by what destinations are popular or trendy at the moment	**80%**	139
I travel when I need to	**71%**	152
I generally prefer to go back to the same destinations on holiday	**65%**	150
I generally don't participate in physical activities during my holidays	**64%**	139
I seek out destinations that offer quiet opportunities for deep self-reflection	**55%**	137
It's not important to me that I come back from travels having learnt something new	**50%**	140
I don't consider travel to be an important milestone of growing up	**44%**	153
You can get to know a country without experiencing its culture	**42%**	140

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	**66%**	118
To find much-needed time to relax	**59%**	139
To feel safe and secure	**53%**	139
To enjoy simple, straightforward travel	**37%**	145
To be familiar with my surroundings	**20%**	127
To feel confident travel with no surprises	**16%**	144

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	**77%**	146
Safe	**74%**	129
Peaceful	**65%**	147
Reliable	**44%**	136
Familiar	**30%**	147
Practical	**26%**	150

SIMPLICITY LOVERS

OUR DEMOGRAPHICS

AGE

	SCORE	INDEX
18-34	**9%**	64
35-54	**26%**	88
55+	**64%**	130
MEAN YEARS	**57.6**	135

HH INCOME (CAD)

	SCORE	INDEX
Less than $40K	**26%**	122
$40K to <$120K	**64%**	78
$120K or more	**6%**	77
Refused	**5%**	119

EMPLOYMENT

	SCORE	INDEX
Employed FT	**33%**	66
Employed PT	**7%**	94
Self-employed	**5%**	107
Retired	**45%**	132

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	18
Secondary education	**30%**	131
Post-secondary education	**67%**	68

IMMIGRATION STATUS

	SCORE	INDEX
Non-immigrant	**82%**	119
Recent immigrant (<5y)	**1%**	72
Non-recent immigrant (5+y)	**17%**	90

60%
76 Have a valid passport

GENDER

50% 94 Male

50% 107 Female

0% 86 Non-binary / Other

HOUSEHOLD

9% 88 Children <18 Living At Home*

10% 113 Children 18+ Living At Home*

42% 131 Children NOT Living At Home*

49% 99 No Children

** Option is not exclusive*

CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	**33%**	56
Quebec	**28%**	133
British Columbia	**16%**	115
Alberta	**12%**	112
Manitoba	**5%**	130
New Brunswick	**3%**	115
Nova Scotia	**2%**	110
Saskatchewan	**1%**	70
Newfoundland and Labrador	**1%**	87
Prince Edward Island	**0%**	81

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

93

TRAVEL TRADE INDEX: **GROUP**

71

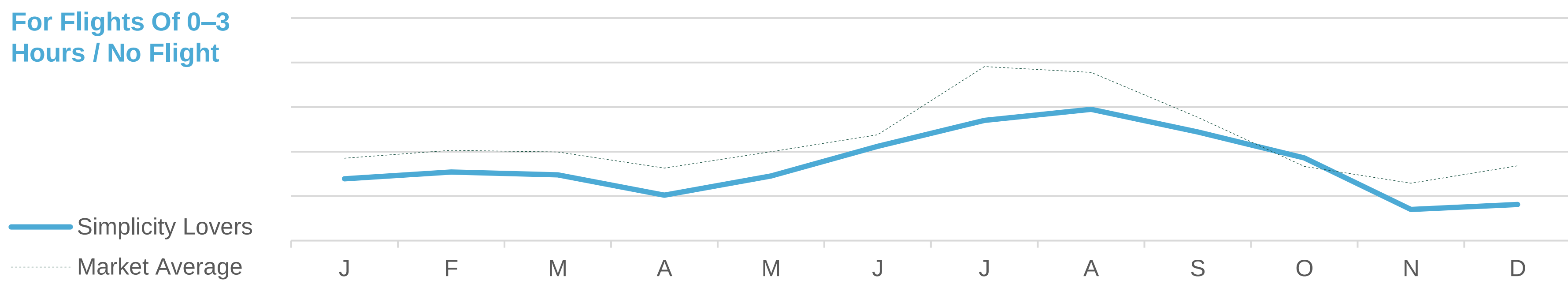
KEY terminology on this page

- **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.

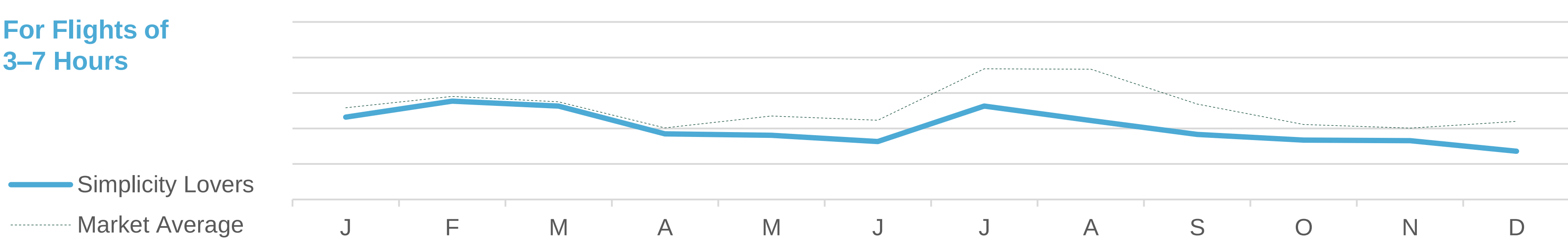
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	33%	79
3-5 Days	15%	66
1 Week Holiday	6%	74
2 Weeks Holiday	3%	71
3 Weeks Or More	2%	70

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	31%	76
International Leisure	11%	76
Business Trip	2%	66
Added Personal To Business	2%	74
Worked During Vacation	1%	72

Incidence is frequency of 2+ times per year

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**47%**	94
Friend's or family's place	**33%**	141
Premium Hotel	**15%**	82
All-inclusive resort	**15%**	87
Vacation Rental (e.g., Airbnb, Vrbo)	**14%**	67
Budget Hotel	**12%**	99

THOUGHTS ON INDIGENOUS TRAVEL

29%

76 INDEX SCORE

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

3%

77 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	**59%**	60
I really want to learn about the history of the destinations I visit	**54%**	77
I like to explore places that are off the beaten path and less explored	**35%**	78
I'm open to travelling to destinations with limited tourist infrastructure	**29%**	84
I'm willing to put in the effort while travelling in order to see lesser-known places	**29%**	70
I'm open to visiting destinations with challenging climates or weather conditions	**11%**	71

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	66%	109
Adult relatives	24%	116
Friends	13%	94
Solo	12%	94
Kids	7%	92

BUDGET

AVERAGE SPEND SHORT-HAUL

$1,290

75 INDEX SCORE

AVERAGE SPEND MID-HAUL

$2,390

100 INDEX SCORE

SPEND STYLE

Value to Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	49%	87
I consider the impact that I personally have on the destinations I visit	40%	87
It's important to me that I visit somewhere that is open to diversity and inclusion	27%	72
Hearing from underrepresented communities is an important part of travelling	22%	80
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	21%	79

22%

PRIORITIZE SUSTAINABLE TRAVEL

75 INDEX SCORE

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

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

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	**46%**	101
○ Nature walks	**29%**	103
○ Hiking	**20%**	96
○ Viewing wildlife in natural habitat	**17%**	95
Shopping	**40%**	107
○ Outdoor markets	**21%**	98
○ Souvenir shopping	**19%**	100
Casual sports	**18%**	113
○ Golfing	**9%**	123
○ Fishing	**8%**	126
Health and wellness	**17%**	96
○ Spas	**10%**	93
○ Outdoor hot tub or bath	**7%**	84
Local cuisine	**44%**	83
○ Local restaurants	**39%**	84
○ Cafes or bakeries	**20%**	79
Cultural experiences or attractions	**39%**	63
Family-focused attractions	**25%**	96
Guided tours	**21%**	74
Overnight experiences	**18%**	72
Festivals and events	**18%**	71
Water-based sports	**8%**	81
Nightlife	**4%**	68

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	78%	138	77%	131
To escape from routine	61%	140	63%	144
To spend time with family	47%	103	39%	103
To have fun with friends	29%	114	25%	108
To check off dream travel places	15%	76	12%	64
To seek solitude and isolation	13%	141	4%	97
For a romantic getaway	10%	92	13%	107
To be pampered	10%	106	19%	125
To learn through other cultures	8%	74	19%	77

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	49%	100	56%	116
Visiting friends / family	42%	108	29%	89
Special event (e.g., wedding, reunion)	30%	115	14%	59
Family / friends wanted to go	25%	75	32%	104
Festival or event	12%	76	9%	73
Kids wanted to go	6%	89	8%	92

8% 86 INDEX SCORE

Travel aligns with children's school schedule

14% 78 INDEX SCORE

Take time off for vacation during major holidays

14% 93 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.

49%

Primary Trip Planner

73

INDEX SCORE

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

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

FLIGHT OF **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 – 4.7 Months** ○ Recommendations from friends or family
	4 MONTHS BEFORE MY TRIP	**Booked Accommodation – 3.6 months** ○ Direct with company **Booked Transportation – 3.3 months** ○ Direct with company
Started Researching and Planning – 3 months ○ Recommendations from friends or family **Booked Accommodation – 2.1 months** ○ Direct with company	**3 MONTHS** BEFORE MY TRIP	
	2 MONTHS BEFORE MY TRIP	**Booked Activities – 2.1 months** ○ No need to book
Booked Transportation – 1.9 months ○ Direct with company **Booked Activities – 1.6 months** ○ No need to book	**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

49% 148 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Small Cities & Towns	**17%**	
	Beach Resort	**12%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants	**40%**	
	Famous shopping centres / areas	**18%**	
	Nature walks	**16%**	
KEY BEHAVIOURS	Seeking mild climate to relax. Moderate budget, staying in a hotel or all-inclusive resort		

% OF TOTAL TRIPS

18% 147 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple Only	**47%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Security
ACTIVITIES	Local restaurants	**33%**	
	Outdoor markets	**12%**	
	Cafes or bakeries	**11%**	
KEY BEHAVIOURS	Want to avoid crowds, likely a return visit to a reliable destination		

% OF TOTAL TRIPS

8% 104 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Suburban Experience		
COMPANIONS	Couple Only	**44%**	
	Extended Family	**31%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants	**29%**	
	Famous shopping centres / areas	**21%**	
	Amusement parks or theme parks	**17%**	
KEY BEHAVIOURS	Likely visiting friends, which drives the destination choice and activities		

% OF TOTAL TRIPS

20% 154 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple Only	**34%**	
	Non-Family Only	**22%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants	**58%**	
	Bars and pubs	**26%**	
	Souvenir shopping	**24%**	
KEY BEHAVIOURS	Trip with friends to explore a familiar city, dine out, and have fun		

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

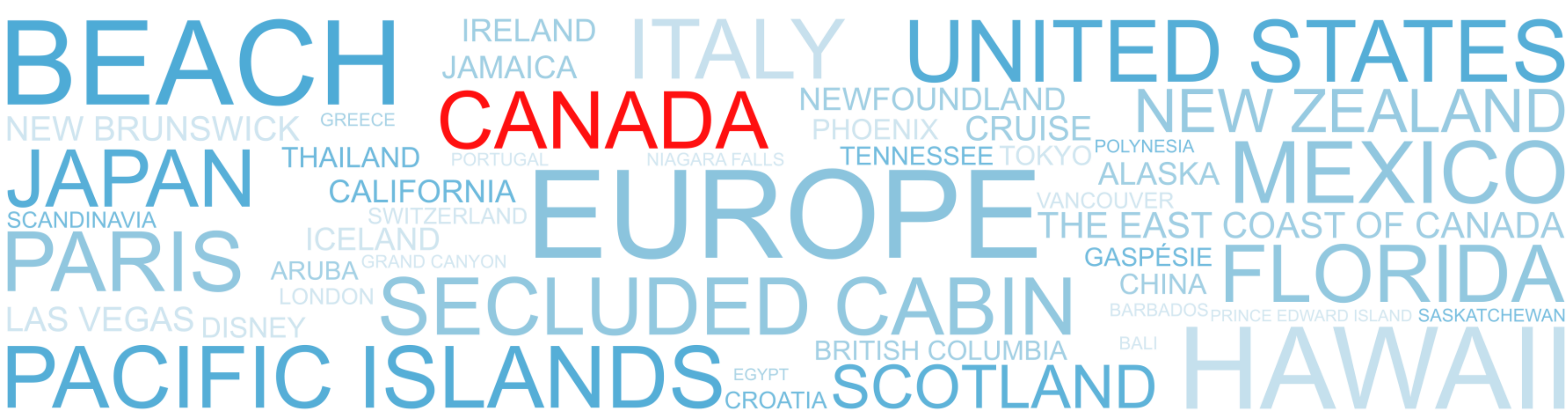
- Since we are only going for a few days, the destinations we choose need to be nearby and easy to get to.
- Shorter trips are mostly in Canada and the US. When we travel internationally, we head to warmer climates like the Caribbean.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Canada	**41%**	134
US	**28%**	119
Mexico	**6%**	102
Cuba	**4%**	143
Dominican Republic	**3%**	109

	SCORE	INDEX
France	**2%**	74
Italy	**2%**	74
Japan	**2%**	83
Bahamas	**2%**	103
Spain	**2%**	80

WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	**73%**	129
Isn't too crowded	**62%**	144
Provides a sense of personal safety	**53%**	132
Has a mild and pleasant climate	**53%**	137
Is easy to travel to	**48%**	130
Language is not a barrier	**40%**	136
Doesn't take too long to get there	**33%**	143
Offers all-inclusive resort packages	**26%**	120

SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

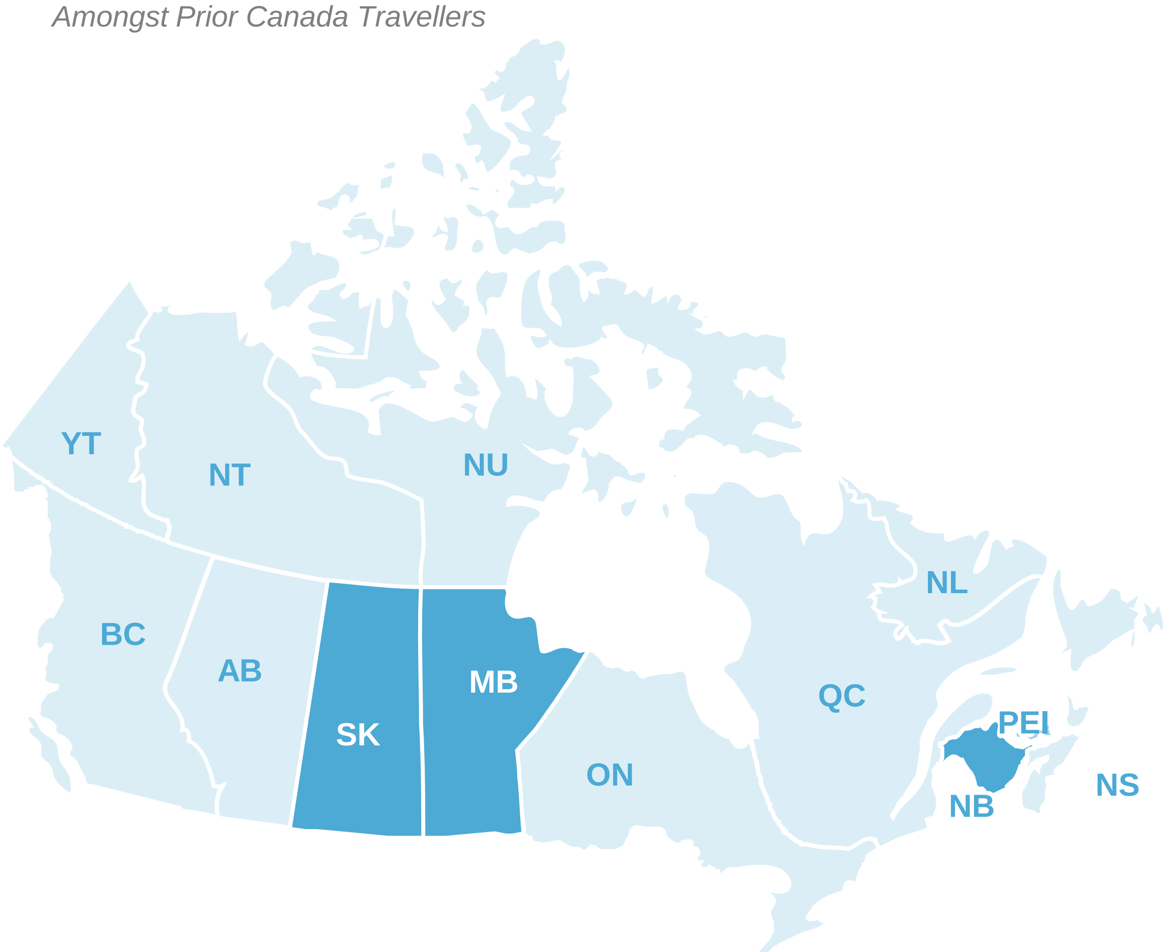
OVERALL INSIGHT

- We have travelled within Canada and explored most provinces and many types of destinations.
- For our next trip within Canada, we are thinking about Ontario, British Columbia, Alberta, or the East Coast.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	13%	92
BC	17%	77
MB	4%	125
NB	8%	138
NL	3%	112
NS	6%	97
NT	0%	85
NU	0%	78
ON	31%	74
PEI	4%	122
QC	23%	114
SK	5%	138
YT	0%	90

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

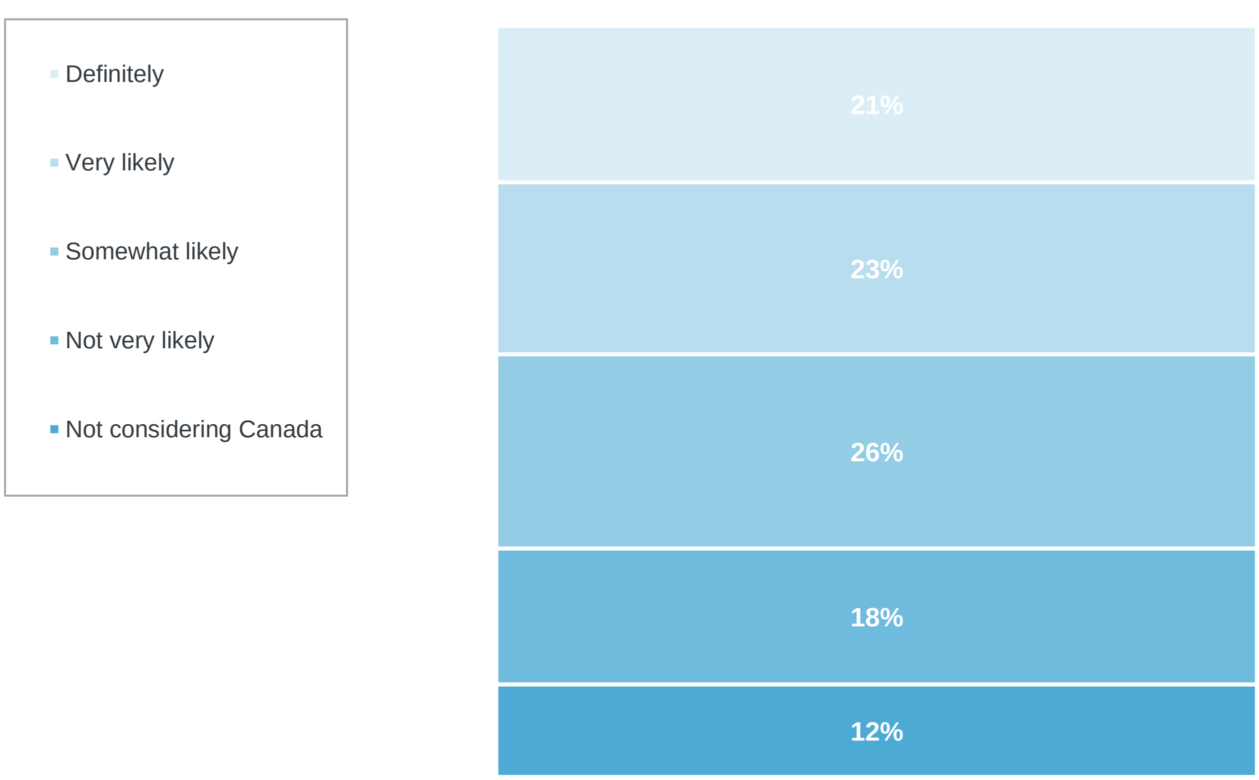
OVERALL INSIGHT

- We travel in fall months , as we have the flexibility, but prefer the summer when the weather is more comfortable.
- We like travelling in our own country because we know what we are getting. There are no surprises and it's a safe and easy trip.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	**4%***	**13%**	**53%**	**33%**
VS. TOTAL MARKET	7%	12%	54%	29%

LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS



INDEX
59
92
104
146
141

*Data point is associated with a small base size.
Results may not be representative and should be interpreted with caution.

SIMPLICITY LOVERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

1%
Had a child
90 INDEX SCORE

18%
Started a new job / career
56 INDEX SCORE

12%
Bought a new home
94 INDEX SCORE

11%
Moved to a new city
64 INDEX SCORE

1%
Child started school
90 INDEX SCORE

36%
Purchased a car
81 INDEX SCORE

18%
Retired
128 INDEX SCORE

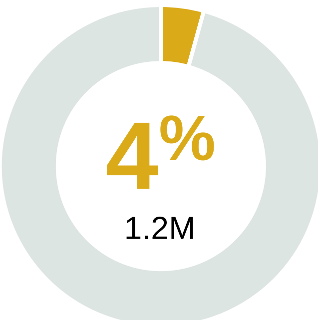
26%
Renovated house
109 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	56%	119
Travel	49%	77
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	43%	109
Personal care and wellness	41%	109
Experiences (e.g., concerts, events).	26%	61
Home and decor	24%	131

FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



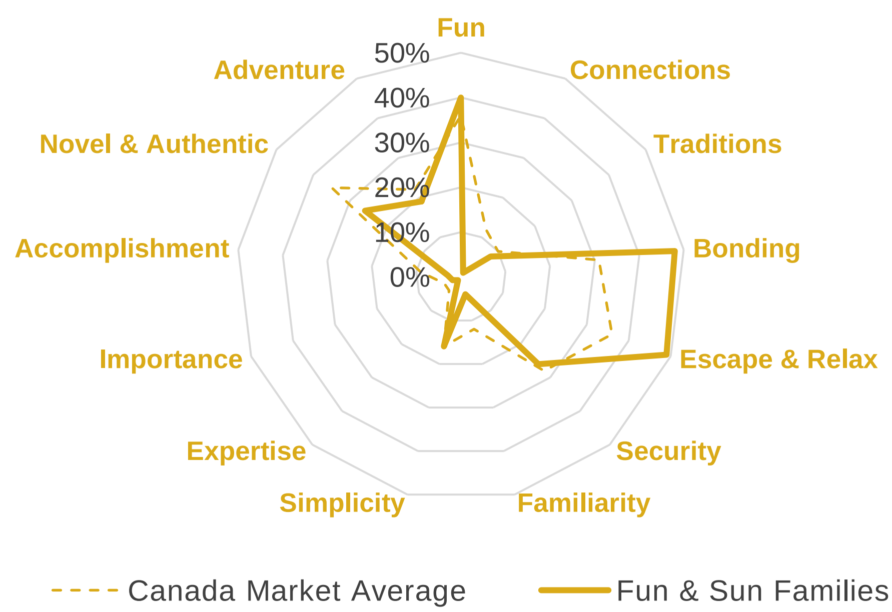
% OF CANADA POPULATION

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. While we generally stay in our comfort zone, we sometimes take trips to challenge ourselves in a new sport or culture.

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. Often the activities we choose are easy and fun, but sometimes we seek more adventure and excitement though more challenging sports.
3. Plan annual vacations months in advance, relying on review sites, apps, social media, and recommendations.
4. Mostly travel within Canada, exploring popular destinations in British Columbia and Ontario, with dreams of international trips.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

68

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

88

How is this calculated?

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

FUN & SUN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We seek comfortable, entertaining destinations to escape everyday demands and enjoy quality time together.
- Prioritizing value, convenience, and relaxation, we choose popular, easily accessible hotspots.
- Our priority is creating memories with our core travel group, though we appreciate and are open to exposure to new and diverse cultures.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally only choose destinations with comfortable climate and weather conditions	86%	122
I prefer planning my trips independently and don't consult travel agencies	83%	125
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	81%	125
I generally avoid places that are challenging or difficult to reach	78%	125
I tend to choose a destination to visit based off value for money	77%	136
I appreciate diversity but not likely engage deeply with Indigenous cultures	75%	131
I generally don't try to learn local languages	73%	134
While travelling I generally stick to places that are direct and convenient to get to	68%	126
I generally don't think much on the impact that I personally have on the destinations I visit	68%	130
I generally stick to the most popular areas when I visit somewhere	67%	124
I will generally not go out of my way to buy local when travelling	63%	142
I'm more interested in the present and don't focus much on the history of where I visit	50%	131
When there's a lot of positive buzz about a destination it makes me want to visit it more	45%	133

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	67%	120
To share quality time with others	60%	146
To find much-needed time to relax	53%	125
To escape the demands of everyday life	52%	144
To let loose and forget about day-to-day life	40%	131
To bond through shared experiences	37%	141

DESIRED DESTINATION

	SCORE	INDEX
Fun	73%	135
Safe	71%	122
Friendly	70%	135
Peaceful	48%	111
Reliable	41%	129
Familiar	19%	115

FUN & SUN FAMILIES

OUR DEMOGRAPHICS

AGE

	SCORE	INDEX
18-34	**21%**	87
35-54	**71%**	157
55+	**8%**	64
MEAN YEARS	**42.1**	77

HH INCOME (CAD)

	SCORE	INDEX
Less than $40K	**18%**	86
$40K to <$120K	**70%**	131
$120K or more	**7%**	88
Refused	**5%**	131

EMPLOYMENT

	SCORE	INDEX
Employed FT	**68%**	135
Employed PT	**7%**	94
Self-employed	**5%**	107
Retired	**6%**	68

EDUCATION

	SCORE	INDEX
Primary education or less	**1%**	62
Secondary education	**14%**	60
Post-secondary education	**85%**	138

IMMIGRATION STATUS

	SCORE	INDEX
Non-immigrant	**71%**	85
Recent immigrant (<5y)	**5%**	100
Non-recent immigrant (5+y)	**24%**	124

53%
60 Have a valid passport

GENDER

39% 59 Male

61% 141 Female

0% 86 Non-binary / Other

HOUSEHOLD

90% 146 Children <18 Living At Home*

11% 125 Children 18+ Living At Home*

5% 67 Children NOT Living At Home*

5% 53 No Children

** Option is not exclusive*

CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	**39%**	96
Quebec	**16%**	61
Alberta	**14%**	142
British Columbia	**13%**	65
Saskatchewan	**6%**	142

	SCORE	INDEX
Manitoba	**4%**	97
Nova Scotia	**3%**	131
Newfoundland and Labrador	**3%**	157
New Brunswick	**2%**	89
Prince Edward Island	**1%**	134

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

71

TRAVEL TRADE INDEX: **GROUP**

74

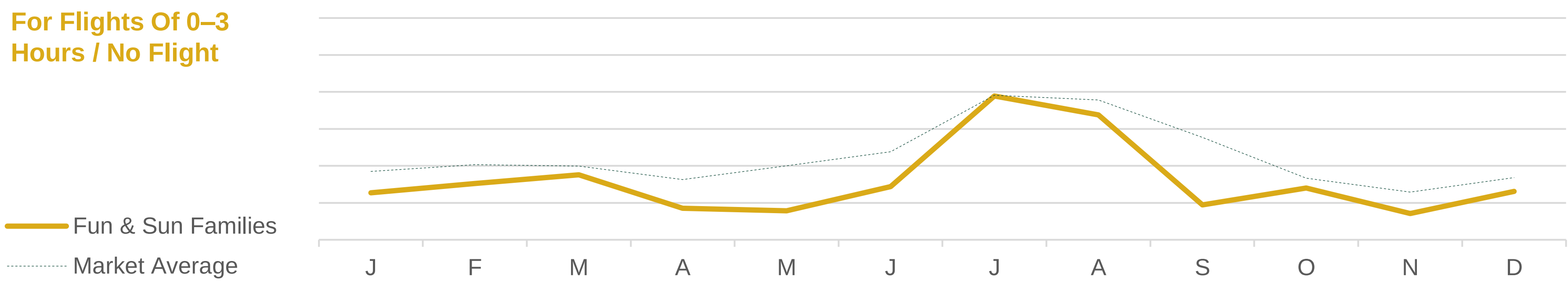
KEY terminology on this page

- **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.

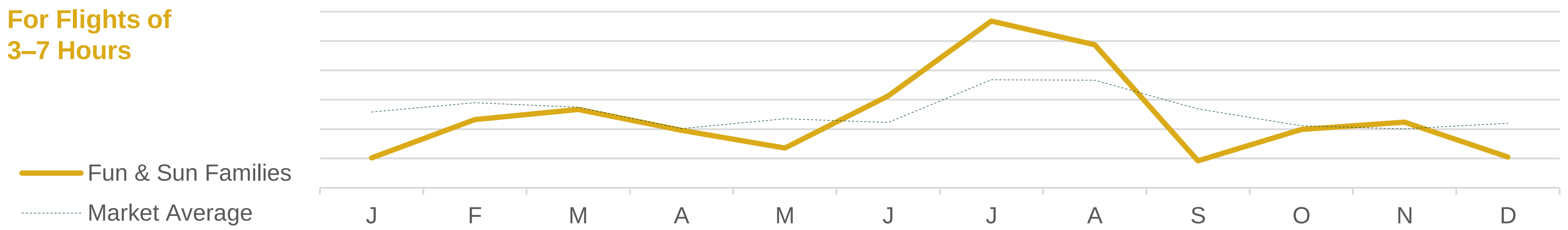
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



TRIP DURATION

		INDEX
1-2 Days	36%	122
3-5 Days	15%	67
1 Week Holiday	5%	69
2 Weeks Holiday	2%	63
3 Weeks Or More	3%	87

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	34%	92
International Leisure	9%	69
Business Trip	6%	89
Added Personal To Business	2%	76
Worked During Vacation	2%	79

Incidence is frequency of 2+ times per year

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**51%**	112
Premium Hotel	**27%**	129
Friend's or family's place	**23%**	87
All-inclusive resort	**21%**	120
Vacation Rental (e.g., Airbnb, Vrbo)	**19%**	95
Budget Hotel	**12%**	100

THOUGHTS ON INDIGENOUS TRAVEL

25%

69 INDEX SCORE

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

3%

77 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	**62%**	72
I really want to learn about the history of the destinations I visit	**50%**	69
I like to explore places that are off the beaten path and less explored	**33%**	76
I'm willing to put in the effort while travelling in order to see lesser-known places	**32%**	74
I'm open to travelling to destinations with limited tourist infrastructure	**25%**	78
I'm open to visiting destinations with challenging climates or weather conditions	**14%**	78

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	84%	144
Kids	77%	148
Adult relatives	24%	121
Friends	8%	73
Solo	2%	55

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,520

100
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	37%	58
I consider the impact that I personally have on the destinations I visit	32%	70
It's important to me that I visit somewhere that is open to diversity and inclusion	29%	74
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	19%	75
Hearing from underrepresented communities is an important part of travelling	17%	72

20%

PRIORITIZE SUSTAINABLE TRAVEL

71 INDEX SCORE

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

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

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	**84%**	154
○ Amusement parks or theme parks	**69%**	157
○ Zoos or aquariums	**60%**	154
○ Space or science centres	**31%**	145
Shopping	**49%**	123
○ Souvenir shopping	**31%**	138
○ Visiting famous shopping centres or areas	**31%**	126
Water-based sports	**20%**	125
○ Swimming	**16%**	138
○ Scuba diving or snorkeling	**8%**	118
Cultural experiences or attractions	**46%**	80
○ Museums	**31%**	84
○ Visiting local monuments	**25%**	83
Nature experiences	**44%**	98
○ See or explore lakes, rivers, or waterfalls	**24%**	107
○ Visiting nature parks or preserves	**22%**	101
Local cuisine	**40%**	74
Guided tours	**27%**	90
Festivals and events	**26%**	89
Overnight experiences	**22%**	93
Health and wellness	**20%**	112
Casual sports	**15%**	90
Nightlife	**8%**	82

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	86%	152	76%	150
To relax and unwind	74%	130	76%	129
To escape from routine	54%	121	53%	118
For adventure and excitement	22%	87	21%	85
To have fun with friends	15%	62	16%	82
To check off dream travel places	13%	66	20%	92
For a romantic getaway	9%	81	9%	87
To have memories from top travel spots	8%	100	7%	85
To be pampered	6%	82	0%	54

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	70%	148	55%	112
Kids wanted to go	60%	148	55%	149
Family / friends wanted to go	42%	125	33%	107
Visiting friends / family	36%	75	24%	73
Special event (e.g., wedding, reunion)	30%	117	23%	107
Festival or event	15%	86	8%	70

59% 147 INDEX SCORE

Travel aligns with children's school schedule

24% 104 INDEX SCORE

Take time off for vacation during major holidays

20% 135 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 long haul holiday over 4 months in advance, getting our accommodation, and even activities, secured.

49%

Primary Trip Planner

73
INDEX SCORE

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

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

FLIGHT OF **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 – 4.3 Months** ○ Travel booking sites / apps
	4 MONTHS BEFORE MY TRIP	**Booked Accommodation – 3.3 months** ○ Direct with company **Booked Transportation – 3.1 months** ○ Direct with company **Booked Activities – 3.1 months** ○ Direct with company
Started Researching and Planning – 3 months ○ Travel review sites **Booked Accommodation – 2.2 months** ○ Travel booking sites / apps	**3 MONTHS** BEFORE MY TRIP	
Booked Transportation – 1.9 months ○ Direct with company **Booked Activities – 1.1 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 also take trips like Purpose Driven Families.

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

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

% OF TOTAL TRIPS: 55% — 147 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Family Trip		
DESTINATION TYPE	Urban Centre		**27%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants		**28%**
	Amusement parks / theme parks		**22%**
	Outdoor markets		**18%**
KEY BEHAVIOURS	All about kids interests, famous kids attractions, lower budget		

% OF TOTAL TRIPS: 20% — 146 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear Family With Kids		**46%**
	Extended Family		**27%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Swimming		**30%**
	Oceanside beaches		**26%**
	Local restaurants		**21%**
KEY BEHAVIOURS	Planned in advance, larger group, hotel or all-inclusive, comfortable climate		

% OF TOTAL TRIPS: 5% — 95 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Mountain Retreat		
COMPANIONS	Nuclear Family With Kids		**75%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Novel & Authentic
ACTIVITIES	See or explore mountains		**33%**
	Hiking		**29%**
	Snowboarding or downhill skiing		**18%**
KEY BEHAVIOURS	Exploring the outdoors on a budget, ski / boarding trip or summer hiking		

% OF TOTAL TRIPS: 10% — 112 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Adventure Destination		
COMPANIONS	Nuclear Family With Kids		**61%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Adventure	Security
ACTIVITIES	Amusement parks / theme parks		**47%**
	Local restaurants		**44%**
	Nature parks / preserves		**22%**
KEY BEHAVIOURS	Exploring a bucket list destination, seeking adventure, planned more last minute		

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 in Canada, exploring British Columbia and Ontario. Outside of Canada, we head south to the US.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
Canada	**39%**	127
US	**32%**	144
Mexico	**7%**	118
Cuba	**2%**	91
Dominican Republic	**2%**	77

	SCORE	INDEX
Iran	**2%**	160
India	**2%**	107
Japan	**2%**	75
Philippines	**2%**	147
Italy	**2%**	67

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	**82%**	144
Is not too expensive	**74%**	130
Is easy to travel around once there	**50%**	121
Provides a sense of personal safety	**50%**	124
Is easy to travel to	**43%**	121
Good connectivity (Wi-Fi, cell service, etc.)	**38%**	139
Offers all-inclusive resort packages	**23%**	110
Has packaged holiday / vacation offers	**17%**	120

FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

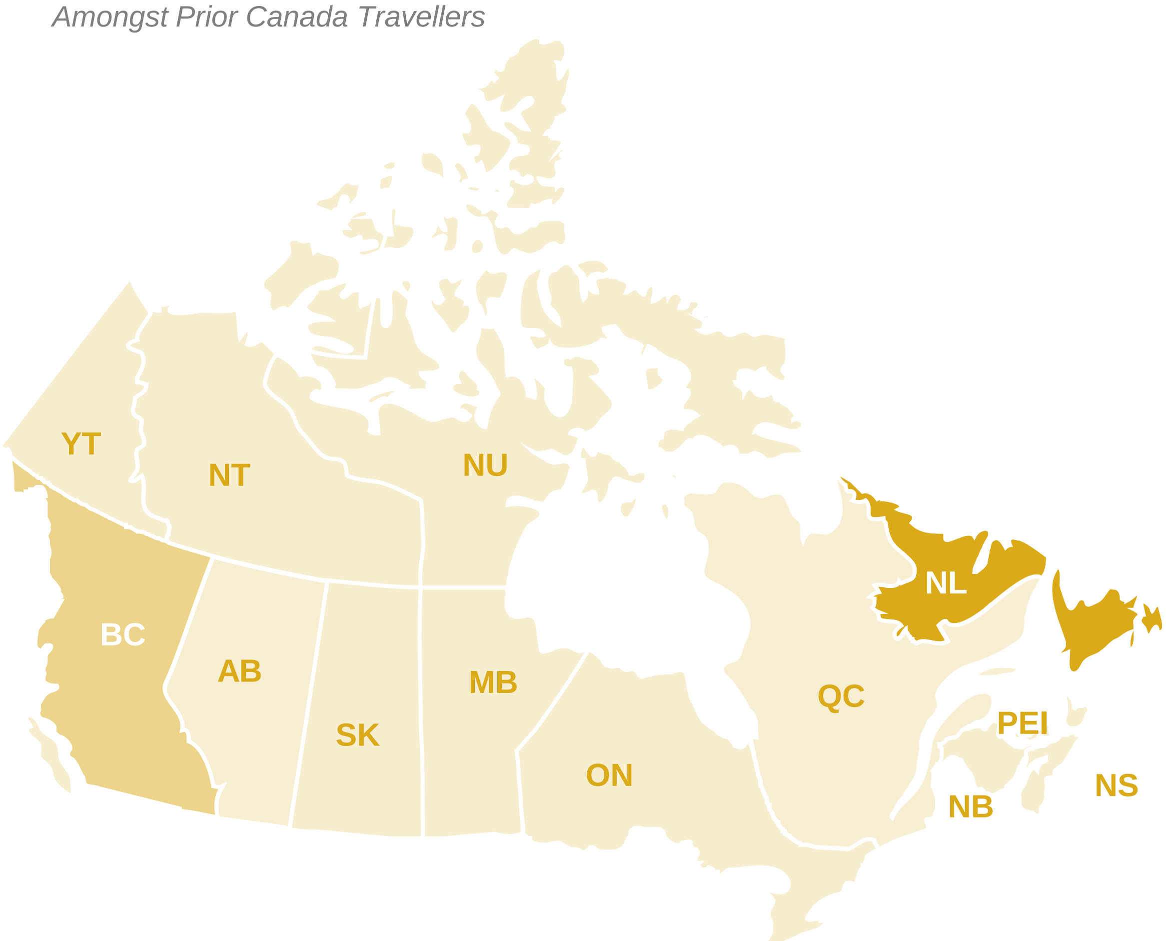
OVERALL INSIGHT

- We love travelling in Canada, and find our Canadian trips exceed our expectations.
- We often travel within our own province, but are considering going further within Canada.
- For our next trip within Canada, we'd like to visit British Columbia, Ontario, or Quebec.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	13%	94
BC	21%	124
MB	2%	53
NB	4%	79
NL	4%	134
NS	8%	113
NT	0%	85
NU	0%	78
ON	33%	84
PEI	2%	62
QC	15%	48
SK	2%	81
YT	0%	76

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

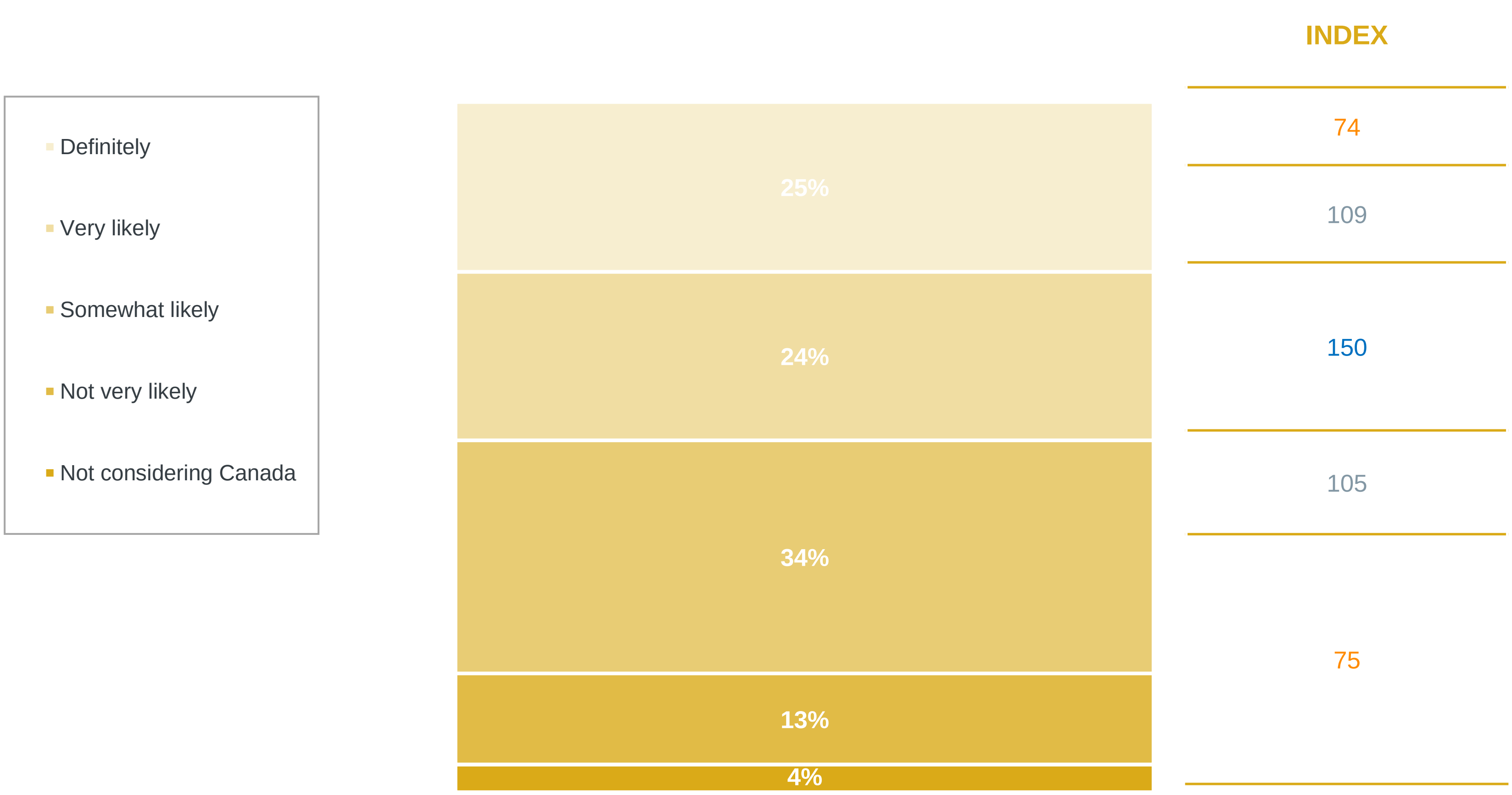
OVERALL INSIGHT

- We are generally limited to travel during our kids school holidays.
- We love the hot spots in Canada, including the big cities, cottage country, and wine regions.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	**SPRING** (Mar-May)	**SUMMER** (Jun-Aug)	**AUTUMN** (Sept-Nov)
FUN & SUN FAMILIES	**5%***	**8%***	**76%**	**11%***
VS. TOTAL MARKET	7%	12%	54%	29%

LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS



*Data point is associated with a small base size.
Results may not be representative and should be interpreted with caution.

FUN & SUN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

26%
Had a child
138 INDEX SCORE

29%
Started a new job / career
102 INDEX SCORE

23%
Bought a new home
137 INDEX SCORE

19%
Moved to a new city
120 INDEX SCORE

28%
Child started school
141 INDEX SCORE

49%
Purchased a car
147 INDEX SCORE

3%
Retired
64 INDEX SCORE

29%
Renovated house
134 INDEX SCORE

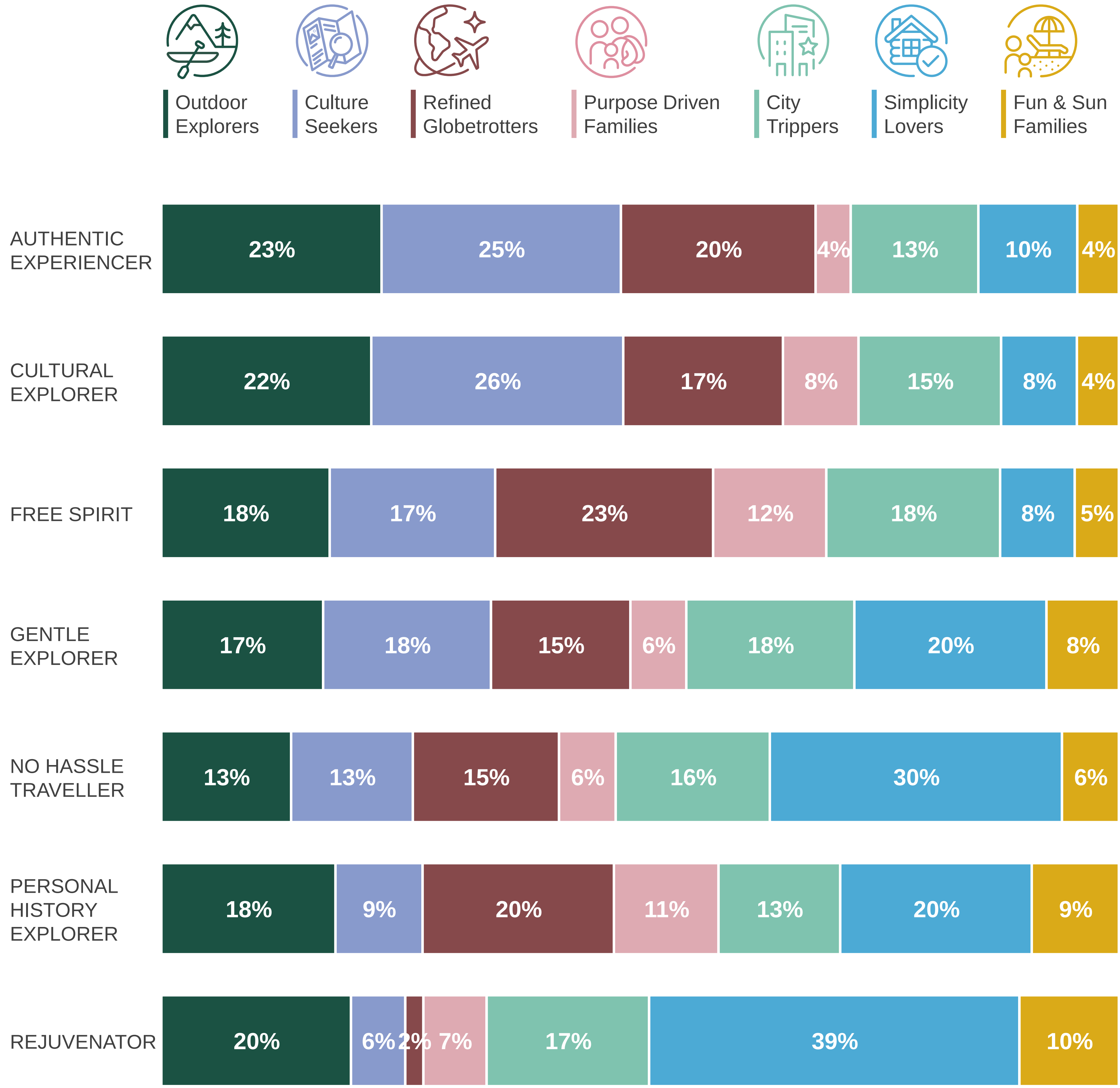
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	51%	83
Savings and investments	49%	90
Personal care and wellness	48%	147
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	46%	121
Experiences (e.g., concerts, events).	33%	98
Home and decor	25%	136

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

DOMESTIC TRAVEL LIKELIHOOD INDEX	Indicator of the overall likelihood to travel domestically. The index is calculated using ta combination of number of domestic trips per year, the likelihood of future out-of-province travel over next two years, and historical number of provinces visited. Indexed against other segments in the market.	
DESIRED DESTINATION	How a traveller describes the personality of an ideal destination.	
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).