FRANCE MARKET PROFILES

France continues to stand as a global beacon for culture and authenticity, with French travellers deeply invested in seeking meaningful experiences in their journeys.

Whether exploring their own iconic regions or venturing abroad, French travellers crave the opportunity to immerse themselves in rich culture and embrace new settings where they can truly unwind.

FRANCE

DESTINATION CANADA

A GUIDE
TO UNDERSTANDING THE PROFILE

THE STRUCTURE

Understand The Market	○ Overall segment sizes in the market ○ Segment comparison by key metrics	01
Explore The Segments	○ Detailed profiles per segment	04
Glossary	○ Additional definitions for key terminology referenced in this profile	104

HOW TO READ THE DATA

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

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

FOR EXAMPLE:

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

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

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

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

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

KEY DEFINITIONS

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

! **KEY** terminology on this page…

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

MARKET OVERVIEW

KEY MARKET HIGHLIGHTS

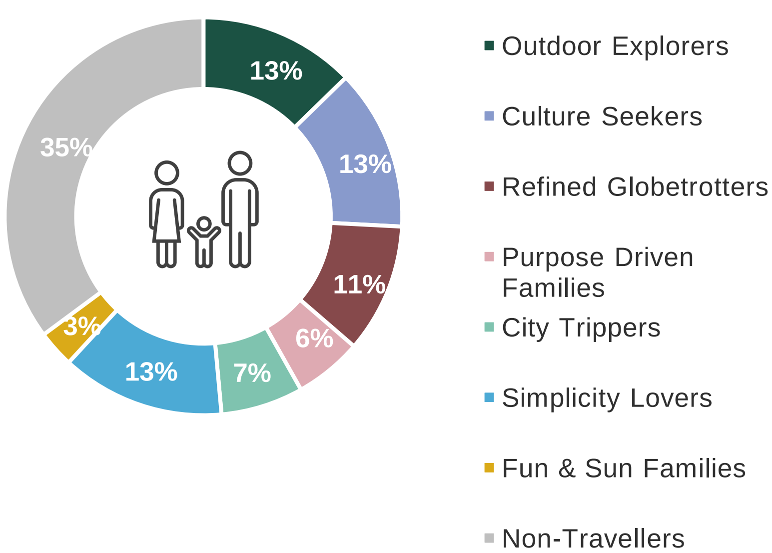
- Prefer quiet destinations, staying away from crowds, and are willing to explore destinations off the beaten path to find them.
- Generally seeking access to nature and the outdoors, and many are open to guided tours to learn about their destinations.
- The escape and ability to live in the moment when travelling is an indulgence, regardless of budget or if activities are not traditionally luxurious.

The France travel market has a large number of Simplicity Lovers, Outdoor Explorers, Culture Seekers, and also features a strong overindex of Purpose Driven Families. Overall as a market there is a high interest in guided tours, winter-based sports, and cultural experiences or attractions.

French travellers are generally quite considerate of their personal impact and often ensure they support the local economy and hear from the original inhabitants of the places they visit.

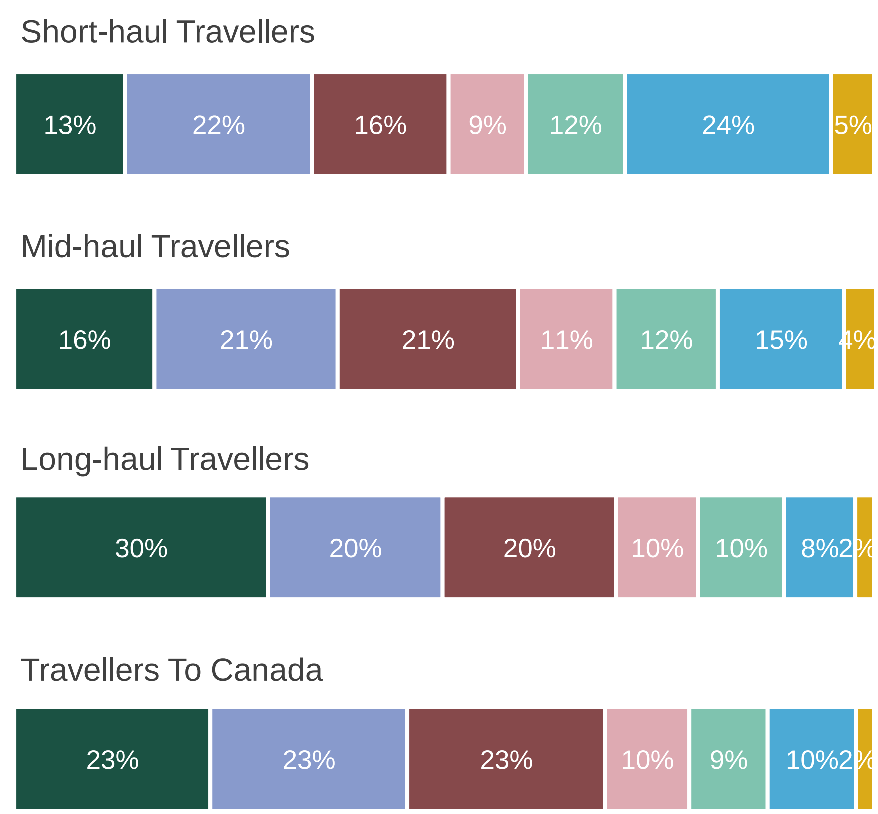
MARKET SIZING

POPULATION BREAKDOWN



35.4% of the adult population in France (est. **52M**) are non-travellers (est. **18M**). Reasons for not travelling are often financial or lack of interest in travelling.

OUTBOUND TRAVELLERS' BREAKDOWN



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

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

MARKET SEGMENTS OVERVIEW

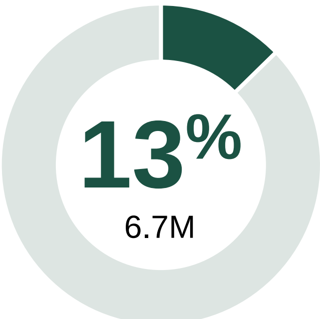
	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	**6.7M**	**Yes**	○ Nature Experiences ○ Winter Sports ○ Guided Tours	○ Adventure ○ Novel & Authentic ○ Accomplishment
CULTURE SEEKERS	**6.7M**	No	○ Cuisine ○ Festivals & Events ○ Cultural Experiences & Attractions	○ Novel & Authentic ○ Connections ○ Familiarity
REFINED GLOBETROTTERS	**5.5M**	**Yes**	○ Cultural Experiences & Attractions ○ Guided Tours ○ Cuisine	○ Novel & Authentic ○ Security ○ Escape & Relax
PURPOSE DRIVEN FAMILIES	**2.8M**	No	○ Family-Focused Attractions ○ Cuisine ○ Cultural Experiences & Attractions	○ Novel & Authentic ○ Bonding ○ Security
CITY TRIPPERS	**3.4M**	No	○ Shopping ○ Nightlife ○ Cuisine	○ Fun ○ Escape & Relax ○ Bonding
SIMPLICITY LOVERS	**6.9M**	No	○ Cuisine ○ Health & Wellness ○ Nature Experiences	○ Escape & Relax ○ Security ○ Simplicity
FUN & SUN FAMILIES	**1.5M**	No	○ Family-Focused Attractions ○ Festivals & Events ○ Cuisine	○ Escape & Relax ○ Fun ○ Security

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

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

OUTDOOR EXPLORERS

PSYCHOGRAPHICS – SUMMARY



% OF FRANCE POPULATION

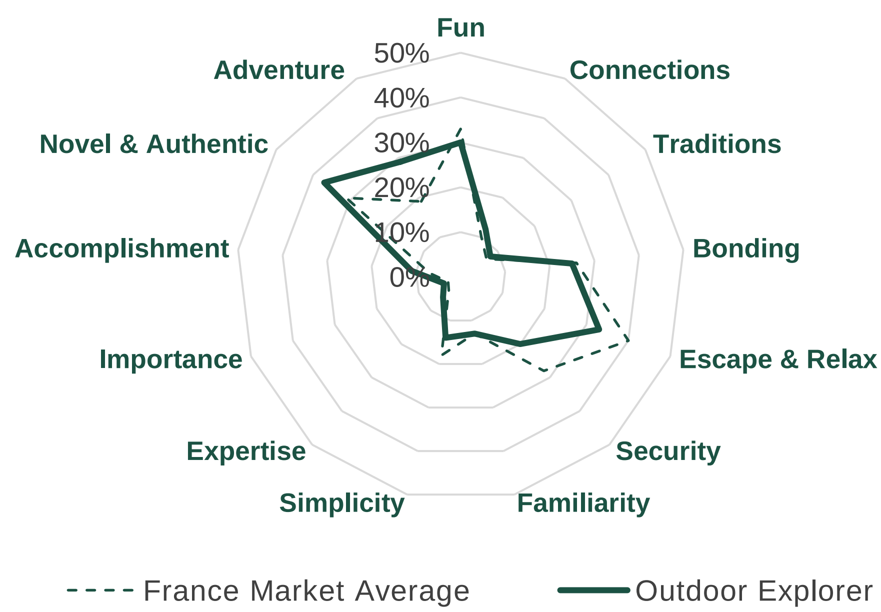
We are daring explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

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

WHAT YOU NEED TO KNOW ABOUT ME

1	We love travel and take all types of trips (domestic / international / business / bleisure).
2	We are nature enthusiasts driven by a sense of accomplishment from overcoming challenges in the great outdoors.
3	We are motivated to share our travel experiences on social channels and with friends, as it helps us showcase our adventures and accomplishments.
4	We are open to and engaged with technology, and use it to maximize our travel experiences.

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

106

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 is an important milestone of personal growth, and we prioritize engaging with the unexplored.
- Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment, and love to post online to share with friends.
- We prioritize authentic, adventurous, and unexplored destinations.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm always on the look out for new destinations to visit next	**78%**	116
I generally think natural attractions are the highlights of my trip	**74%**	141
Exploring the world through travel is an important milestone of growing up	**74%**	112
I like my holiday to have some form of physical activity	**73%**	148
When I travel to natural environments it makes me reflect on how fortunate I am	**71%**	121
I'm passionate about travelling	**64%**	117
I go where I want to go, no matter the hurdles	**61%**	133
I feel best on vacation when being highly active	**57%**	138
I'm open to unconventional accommodations when travelling	**52%**	136
I like to keep my travel plans flexible and often book on short notice	**46%**	130
Videos and pictures on social media inspire me to travel	**43%**	119
I love posting my trips on social media to share with friends	**43%**	126
I'd be open to using AI-powered chatbots for travel planning and assistance	**24%**	122

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	**40%**	123
To feel a sense of adventure	**35%**	142
To be proud to share my travel experiences	**23%**	122
To push my limits and challenge myself	**13%**	150
To feel like I've accomplished something	**10%**	123
To feel like a travel expert	**6%**	118

DESIRED DESTINATION

	SCORE	INDEX
Authentic	**56%**	115
Adventurous	**50%**	151
Unique	**36%**	121
Free-Spirited	**25%**	122
Unexplored	**25%**	151
Passionate	**20%**	114

OUTDOOR EXPLORERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are under 45 years of age, and if we have kids they are older.
- We are working full time earning a moderate income.
- Find us in the Paris Region (Ile-de-France).

AGE

	SCORE	INDEX
18-34	**30%**	114
35-54	**32%**	100
55+	**38%**	93
MEAN YEARS	**47.2**	90

HH INCOME (CAD)

	SCORE	INDEX
$50K or less	**21%**	100
>$50K to $100K	**66%**	101
More than $100K	**10%**	106
Refused	**3%**	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	**58%**	113
Employed PT	**4%**	93
Self-employed	**4%**	120
Retired	**23%**	90

EDUCATION

	SCORE	INDEX
Primary education or less	**3%**	90
Secondary education	**37%**	92
Post-secondary education	**60%**	110

73%
103 Have a valid passport

GENDER

51% 110 Male

49% 92 Female

0% 94 Non-binary / Other

HOUSEHOLD

31% 101 Children <18 Living At Home*

6% 73 Children 18+ Living At Home*

27% 95 Children NOT Living At Home*

41% 102 No Children

** Option is not exclusive*

FRANCE REGION BREAKOUT

	SCORE	INDEX
Île-de-France	**21%**	99
Aquitaine-Limousin-Poitou-Charentes	**13%**	138
Auvergne-Rhône-Alpes	**12%**	102
Provence-Alpes-Côte d'Azur	**9%**	118
Languedoc-Roussillon-Midi-Pyrénées	**9%**	77
Nord-Pas-de-Calais / Picardie	**8%**	96

	SCORE	INDEX
Alsace-Champagne-Ardenne-Lorraine	**8%**	108
Normandie	**5%**	106
Centre-Val de Loire	**5%**	105
Pays de la Loire	**4%**	82
Bourgogne-Franche-Comté	**4%**	92

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

96

TRAVEL TRADE INDEX: **GROUP**

100

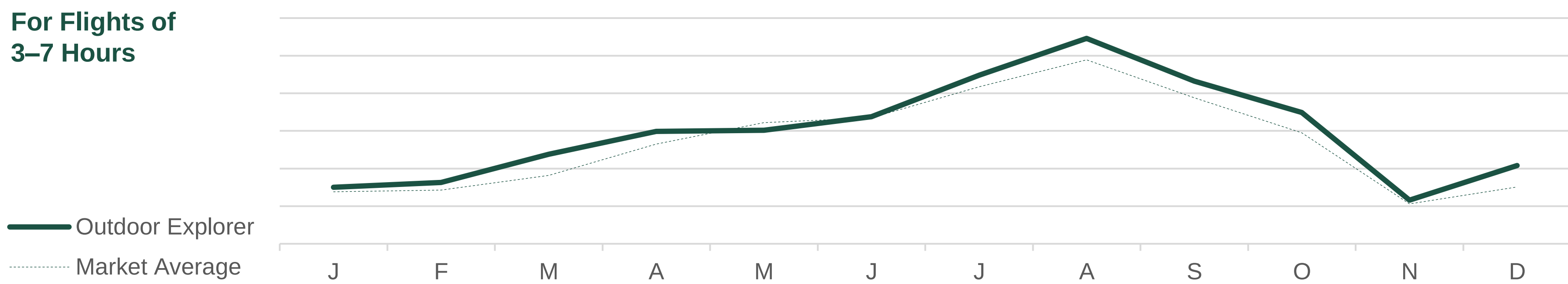
KEY terminology on this page

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

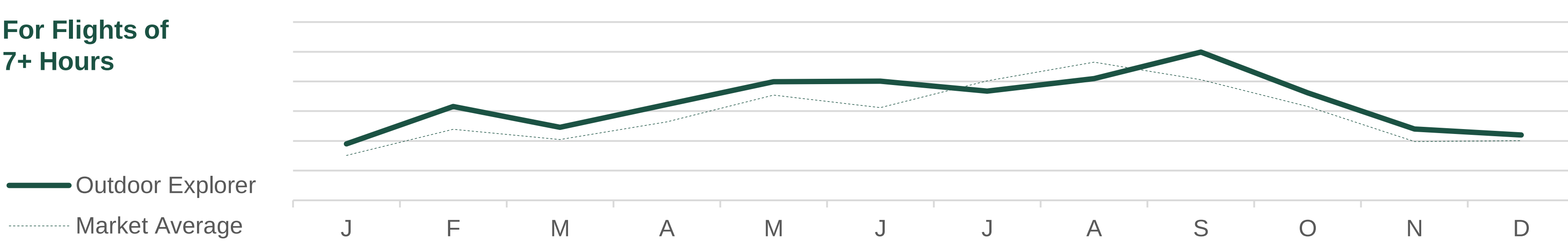
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	35%	108
3-5 Days	27%	111
1 Week Holiday	25%	118
2 Weeks Holiday	15%	120
3 Weeks Or More	8%	118

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	39%	105
International Leisure	17%	108
Business Trip	9%	103
Added Personal To Business	5%	108
Worked During Vacation	5%	106

Incidence is frequency of 2+ times per year

DESTINATION CANADA

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Vacation Rental (e.g., Airbnb, Vrbo)	34%	98
Mid-priced Hotel	31%	84
Friend's or family's place	25%	90
Premium Hotel	15%	84
Campsite	12%	104
Bed & Breakfast	12%	132

THOUGHTS ON INDIGENOUS TRAVEL

68%

114 INDEX SCORE

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

11%

122 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	84%	136
I'm willing to put in the effort while travelling in order to see lesser-known places	81%	133
You only ever get to know a country by experiencing its culture	75%	112
I'm open to travelling to destinations with limited tourist infrastructure	72%	136
I really want to learn about the history of the destinations I visit	71%	104
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, with friends or alone.
- We sometimes keep a budget due to the frequency of our trips.

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**61%**	92
Kids	**16%**	95
Adult relatives	**16%**	85
Friends	**15%**	111
Solo	**13%**	103

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,010

108
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	**63%**	103
I consider the impact that I personally have on the destinations I visit	**60%**	108
Hearing from under-represented communities is an important part of travelling	**58%**	106
It's important to me that I visit somewhere that is open to diversity and inclusion	**53%**	100
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**44%**	109

53%

PRIORITIZE SUSTAINABLE TRAVEL

119 INDEX SCORE

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

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

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We seek adventure options and anything that lets us immerse ourselves in nature.
- Overnight experiences offering exploration or retreats are also of interest.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	**63%**	146
○ Hiking	**40%**	147
○ Nature walks	**38%**	142
○ See or explore lakes, rivers, or waterfalls	**35%**	147
Winter-based sports	**23%**	135
○ Snowboarding or downhill skiing	**14%**	124
○ Snowshoeing or cross-country skiing	**8%**	125
Water-based sports	**17%**	142
○ Kayaking, canoeing, or paddle-boarding	**8%**	138
○ Swimming	**6%**	128
Casual sports	**17%**	142
○ Casual biking	**6%**	130
○ Fishing	**4%**	117
Overnight experiences	**15%**	122
○ Train trip	**7%**	136
○ Staying at resort or cabin in nature	**5%**	121
High-intensity sports	**14%**	138
Cultural experiences or attractions	**40%**	77
Guided tours	**37%**	100
Local cuisine	**32%**	49
Family-focused attractions	**21%**	94
Health and wellness	**20%**	82
Festivals and events	**16%**	88

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	50%	79	53%	94
To escape from routine	39%	96	49%	124
For adventure and excitement	40%	132	52%	134
To spend time with family	26%	85	28%	89
To learn through other cultures	42%	104	53%	112
To have fun with friends	10%	90	8%	78
To have memories from top travel spots	24%	122	9%	85
For a romantic getaway	14%	90	10%	66
For personal reflection and growth	25%	129	15%	117

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	50%	109	40%	81
Visiting friends / family	15%	74	26%	92
Family / friends wanted to go	23%	91	13%	83
Kids wanted to go	21%	104	22%	101
Special event (e.g., wedding, reunion)	14%	89	14%	94
Festival or event	5%	80	13%	106

24% 95 INDEX SCORE

Travel aligns with children's school schedule

32% 97 INDEX SCORE

Take time off for vacation during major holidays

13% 92 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.

68%

Primary Trip Planner

113
INDEX SCORE

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

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

FLIGHT OF **3–7 HOURS**		FLIGHT OF **7+ HOURS**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 5.8 Months** ○ Travel guidebooks ○ Travel agents / advisors
	5 MONTHS BEFORE MY TRIP	**Booked Transportation – 4.5 months** ○ Travel booking sites / apps **Booked Accommodation – 4 months** ○ Travel booking sites / apps
Started Researching and Planning – 3.5 months ○ Recommendations from friends or family	**4 MONTHS** BEFORE MY TRIP	
	3 MONTHS BEFORE MY TRIP	**Booked Activities – 2.8 months** ○ Travel booking sites / apps
Booked Accommodation – 2.3 months ○ Travel booking sites / apps **Booked Transportation – 2.1 months** ○ Travel booking sites / apps **Booked Activities – 1.8 months** ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips are to mountain or wildlife / nature reserve destinations.
- At times we take trips like Culture Seekers and Simplicity Lovers.

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

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

% OF TOTAL TRIPS: 8% — 108 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Mountain Retreat		
COMPANIONS	Couple only	35%	
	Extended family	26%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Hiking	49%	
	See or explore mountains	38%	
	Snowboarding or downhill skiing	13%	
KEY BEHAVIOURS	Trip to an authentic mountain town. Staying in a vacation rental or camping		

% OF TOTAL TRIPS: 10% — 121 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●● (5 of 5)

TRIP TYPE	Wildlife & Nature Reserve		
COMPANIONS	Couple only	49%	
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Escape & Relax
ACTIVITIES	Viewing wildlife in natural habitat	38%	
	Nature walks	34%	
	Visiting nature parks or preserves	34%	
KEY BEHAVIOURS	Seeking adventure and remote access to nature. Planning more in advance		

% OF TOTAL TRIPS: 13% — 93 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○ (3 of 5)

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre	23%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Security
ACTIVITIES	Local restaurants	41%	
	Museums	30%	
	Visiting local monuments	21%	
KEY BEHAVIOURS	Trip to visit friends and explore a unique city. Planning more last minute		

% OF TOTAL TRIPS: 42% — 148 INDEX SCORE

SEGMENT ALIGNMENT: ●●○○○ (2 of 5)

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort	23%	
	Small cities and town	20%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Simplicity
ACTIVITIES	Local restaurants	52%	
	Visiting local monuments	25%	
	Outdoor markets	22%	
KEY BEHAVIOURS	Couples getaway to slow down in an easy and peaceful environment		

OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

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

WHERE WE ARE GOING LATELY

	SCORE	INDEX
France	35%	91
Spain	9%	60
Italy	8%	85
Portugal	4%	81
Greece	3%	106

	SCORE	INDEX
USA	3%	100
Switzerland	3%	136
Belgium	3%	114
Canada	3%	127
Germany	2%	94

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	50%	132
Provide access to unique natural wonders	49%	136
Provides opportunities to view wildlife in its natural habitat	41%	140
Provides numerous opportunities for outdoor adventures	38%	153
Offers a range of scenic viewpoints	33%	133
Provides a remote, no-frills experience	29%	150
Has many hidden gems	17%	120
Offers options for adrenaline seekers	13%	144

OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

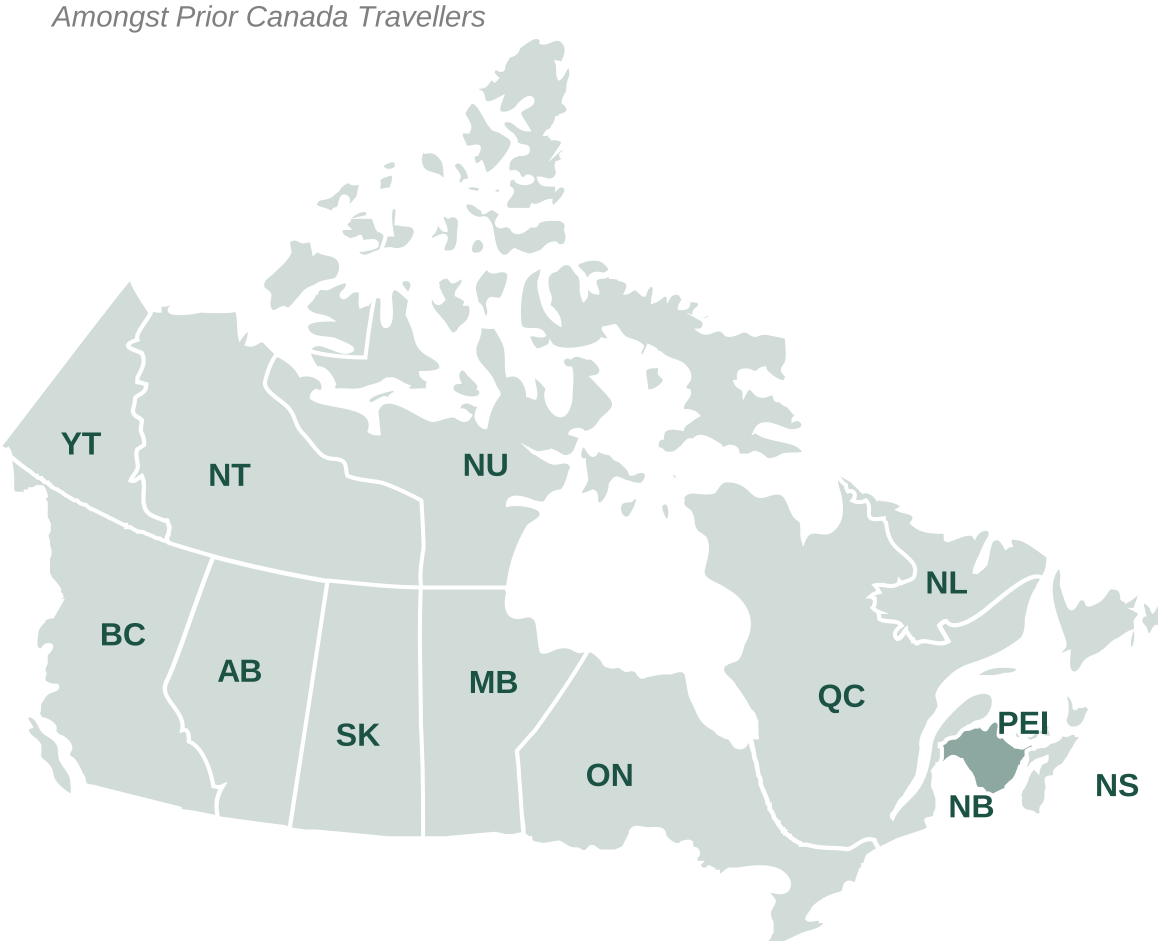
- If we have been to Canada before, it's likely been more than once.
- We have most likely visited Quebec or the Atlantic provinces.
- Future trips to Canada will still include various destinations within Quebec.

WHERE DO WE WANT TO GO IN CANADA

MONTREAL NIAGARA FALLS
MONT ORFORD
BANFF QUEBEC OTTAWA
VAL JALBERT STANLEY PARK
NUNAVUT MORAINE LAKE SAINT-LAURENT
VANCOUVER ONTARIO TORONTO

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	4%	92
BC	8%	94
MB	1%	85
NB	7%	115
NL	4%	95
NS	5%	90
NT	1%	104
NU	0%	84
ON	25%	77
PEI	5%	100
QC	69%	76
SK	3%	102
YT	0%	94

OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- All seasons interest us.
- We have researched some destinations in Canada.

CANADA TRAVEL MONTHS ON A PAST TRIP

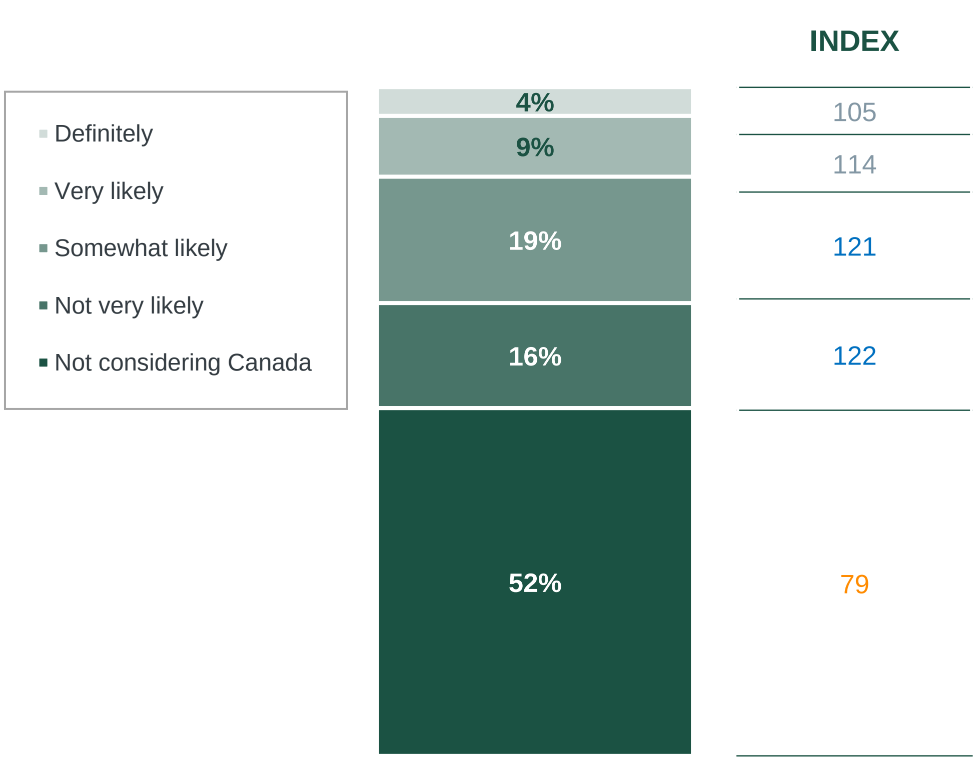
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	**21%**	**25%**	**40%**	**30%**
VS. TOTAL MARKET	16%	22%	47%	30%

14%

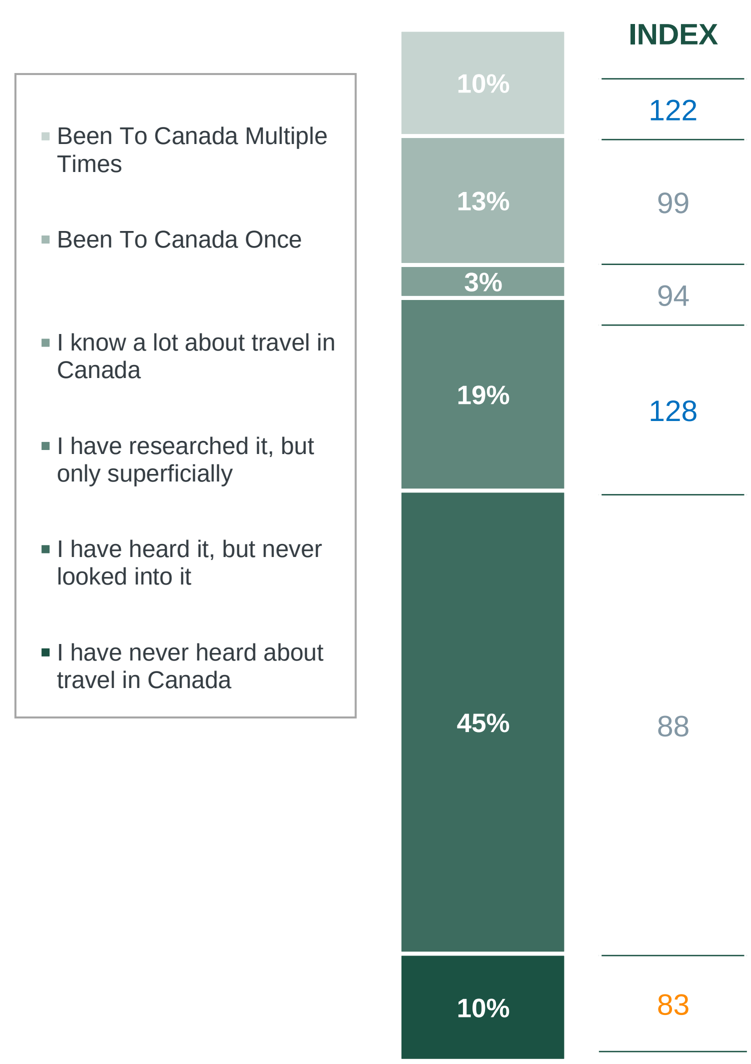
Been to Canada in last 5 years

122 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

- Recent life events have included renovating our home or a career move.
- Outside of travel (which is a priority), we are spending on technology and ensuring we focus on growing our savings and investments.

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%
Had a child
98 INDEX SCORE

25%
Started a new job / career
121 INDEX SCORE

16%
Bought a new home
114 INDEX SCORE

18%
Moved to a new city
101 INDEX SCORE

5%
Child started school
97 INDEX SCORE

43%
Purchased a car
100 INDEX SCORE

10%
Retired
95 INDEX SCORE

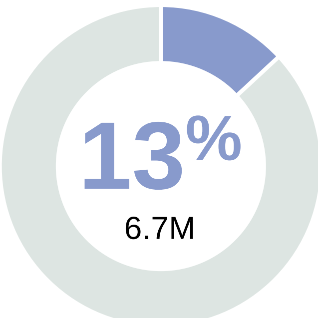
36%
Renovated house
100 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	70%	116
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	49%	113
Savings and investments	41%	95
Personal care and wellness	30%	62
Home and decor	29%	62
Fashion and accessories	24%	83

CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



% OF FRANCE POPULATION

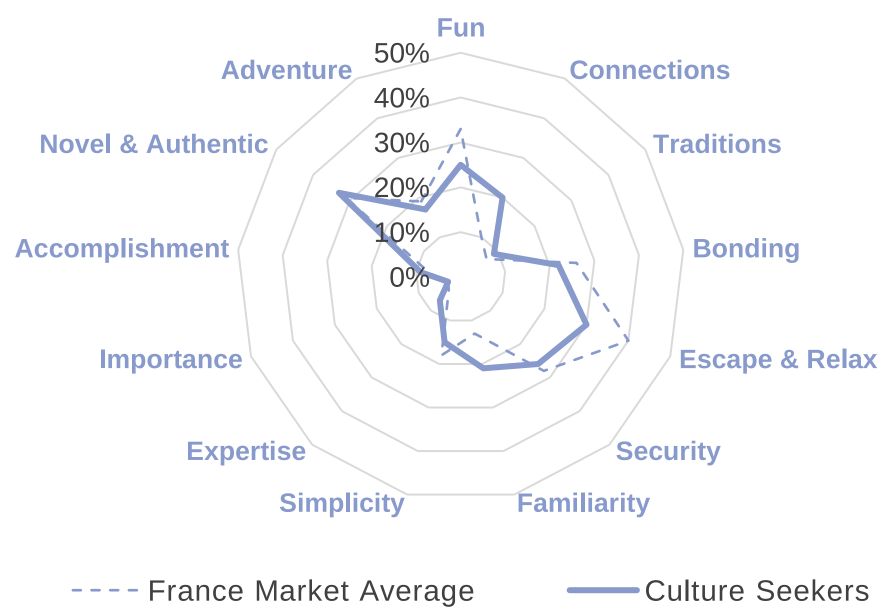
We are sociable, free-spirited individuals who seek unique, authentic experiences. We thrive on immersing ourselves in new perspectives, local culture, making connections, which boosts our energy and confidence.

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

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize diversity, inclusion, sustainability and supporting the local economy.
2. We like the challenge of a new experience, and aren't afraid of trying something different like unconventional accommodations.
3. We try to learn the basics of the language before we travel so we can connect with new people and learn something new.
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

123

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

109

How is this calculated?

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

CULTURE SEEKERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	78%	107
I like to be able to take my time at a historic site or in a museum and not feel rushed	74%	111
When I travel to natural environments it makes me reflect on how fortunate I am	69%	114
I am more likely to select destinations / activities that invest in socially responsible tourism	60%	113
I like natural attractions but I don’t usually think they are the highlights of my trip	57%	126
I learn the basics of a language before visiting a country / region	54%	135
I go where I want to go, no matter the hurdles	53%	120
I seek out destinations where I can explore my ancestral heritage	45%	120
I’m open to unconventional accommodations when travelling	45%	121
I like to keep my travel plans flexible and often book on short notice	43%	120
Even while travelling, I like to maintain regular contact with my duties or obligations back home	39%	120
I seek out fine dining experiences and gourmet cuisine when I travel	32%	126
I’d be open to using AI-powered chatbots for travel planning and assistance	24%	122

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To open my mind to new perspectives	31%	120
To feel like a local	21%	144
To be familiar with my surroundings	21%	126
To feel connected with new people	20%	136
To feel like I’ve accomplished something	11%	126
To feel like a travel expert	7%	132

DESIRED DESTINATION

	SCORE	INDEX
Open	30%	141
Free-Spirited	26%	130
Sociable	26%	138
Accepting	24%	142
Exclusive	7%	110
World-Class	5%	121

CULTURE SEEKERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We represent a diverse age range and most of us don't have children.
- We are generally employed full time.
- We live throughout the country in urban and suburban areas.

AGE

	SCORE	INDEX
18-34	**30%**	114
35-54	**30%**	96
55+	**40%**	95
MEAN YEARS	**47.5**	91

HH INCOME (CAD)

	SCORE	INDEX
$50K or less	**21%**	99
>$50K to $100K	**67%**	108
More than $100K	**9%**	101
Refused	**3%**	79

EMPLOYMENT

	SCORE	INDEX
Employed FT	**53%**	103
Employed PT	**5%**	99
Self-employed	**5%**	131
Retired	**24%**	92

EDUCATION

	SCORE	INDEX
Primary education or less	**4%**	96
Secondary education	**41%**	107
Post-secondary education	**55%**	95

80%
118 Have a valid passport

GENDER

55% 127 Male

43% 69 Female

2% 152 Non-binary / Other

HOUSEHOLD

24% 94 Children <18 Living At Home*

11% 114 Children 18+ Living At Home*

25% 89 Children NOT Living At Home*

51% 115 No Children

** Option is not exclusive*

FRANCE REGION BREAKOUT

	SCORE	INDEX
Île-de-France	**22%**	108
Languedoc-Roussillon-Midi-Pyrénées	**11%**	131
Auvergne-Rhône-Alpes	**11%**	88
Aquitaine-Limousin-Poitou-Charentes	**10%**	101
Pays de la Loire	**8%**	142
Alsace-Champagne-Ardenne-Lorraine	**7%**	90

	SCORE	INDEX
Provence-Alpes-Côte d'Azur	**7%**	84
Nord-Pas-de-Calais / Picardie	**7%**	76
Bretagne	**6%**	124
Normandie	**4%**	77
Centre-Val de Loire	**4%**	87

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

95

TRAVEL TRADE INDEX: **GROUP**

101

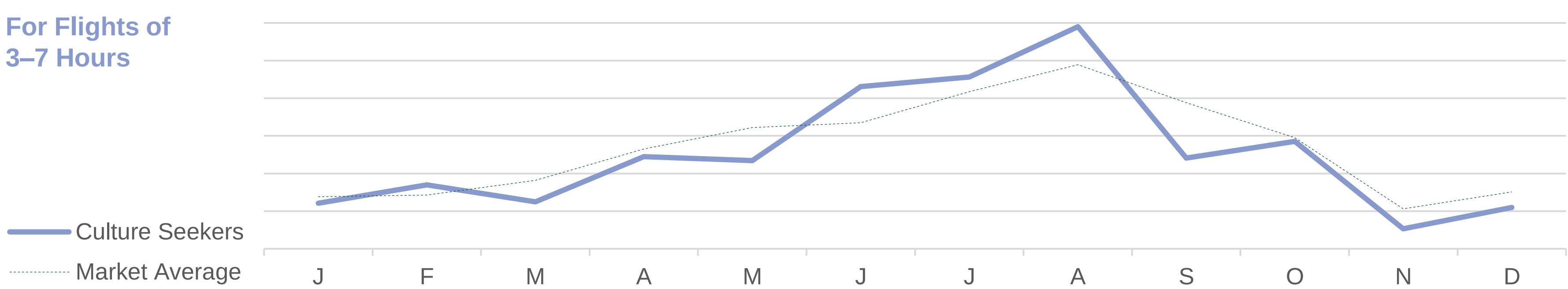
KEY terminology on this page

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

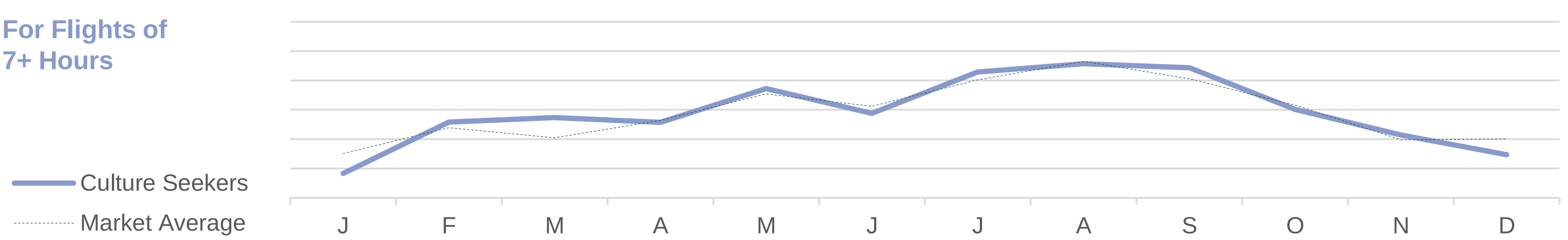
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	37%	113
3-5 Days	28%	112
1 Week Holiday	21%	103
2 Weeks Holiday	15%	119
3 Weeks Or More	9%	126

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	37%	95
International Leisure	17%	111
Business Trip	12%	117
Added Personal To Business	6%	114
Worked During Vacation	9%	138

Incidence is frequency of 2+ times per year

CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**35%**	109
Vacation Rental (e.g., Airbnb, Vrbo)	**33%**	93
Friend's or family's place	**29%**	104
Premium Hotel	**22%**	107
Campsite	**11%**	94
Bed & Breakfast	**9%**	103

THOUGHTS ON INDIGENOUS TRAVEL

70%

119 INDEX SCORE

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

8%

103 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	**77%**	117
You only ever get to know a country by experiencing its culture	**74%**	109
I like to explore places that are off the beaten path and less explored	**71%**	113
I'm willing to put in the effort while travelling in order to see lesser-known places	**68%**	109
I'm open to travelling to destinations with limited tourist infrastructure	**61%**	114
I'm open to visiting destinations with challenging climates or weather conditions	**34%**	115

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	56%	80
Solo	21%	141
Adult relatives	16%	84
Kids	14%	92
Friends	13%	102

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,460

89
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	73%	136
Hearing from under-represented communities is an important part of travelling	71%	126
It's important for me to know that the money I spend will support the local economy I'm visiting	70%	125
I consider the impact that I personally have on the destinations I visit	65%	119
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	50%	123

54%

PRIORITIZE SUSTAINABLE TRAVEL

121 INDEX SCORE

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

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

CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	**54%**	118
○ Visiting local monuments	**39%**	108
○ Museums	**35%**	117
○ Observing architecture	**26%**	124
Local cuisine	**55%**	119
○ Local restaurants	**47%**	116
○ Street cuisine	**21%**	128
Festivals and events	**37%**	138
○ Music concerts or festivals	**22%**	132
○ Cultural or traditional festivals	**19%**	148
Nightlife	**20%**	115
○ Bars and pubs	**13%**	113
○ Clubs and dancing	**8%**	115
High-intensity sports	**7%**	104
○ Mountain biking	**4%**	102
○ Whitewater rafting	**2%**	112
Guided tours	**31%**	88
Nature experiences	**26%**	77
Shopping	**23%**	94
Health and wellness	**18%**	72
Family-focused attractions	**16%**	88
Overnight experiences	**13%**	107
Winter-based sports	**12%**	95

CULTURE SEEKERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	60%	100	54%	95
To escape from routine	30%	80	35%	83
To spend time with family	34%	98	36%	97
To learn through other cultures	36%	93	51%	109
To have fun with friends	22%	110	21%	115
For adventure and excitement	26%	101	26%	90
For a romantic getaway	12%	78	15%	105
To have memories from top travel spots	19%	91	21%	113
To check off dream travel places	13%	106	15%	118

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	44%	89	45%	100
Visiting friends / family	35%	120	37%	110
Family / friends wanted to go	38%	117	24%	113
Festival or event	21%	119	14%	109
Special event (e.g., wedding, reunion)	22%	127	14%	97
Kids wanted to go	15%	96	22%	101

27% 98 INDEX SCORE

Travel aligns with children's school schedule

34% 100 INDEX SCORE

Take time off for vacation during major holidays

21% 129 INDEX SCORE

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

CULTURE SEEKERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

70%

Primary Trip Planner

124
INDEX SCORE

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

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

FLIGHT OF 3–7 HOURS		FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 4.8 Months** ○ Recommendations from friends or family **Booked Transportation – 4.2 months** ○ Travel booking sites / apps
Started Researching and Planning – 3.2 months ○ Travel guidebooks ○ Travel booking sites / apps	**4 MONTHS** BEFORE MY TRIP	**Booked Accommodation – 3.4 months** ○ Travel booking sites / apps
	3 MONTHS BEFORE MY TRIP	**Booked Activities – 2.4 months** ○ Travel booking sites / apps
Booked Transportation – 2.4 months ○ Travel booking sites / apps **Booked Accommodation – 2.0 months** ○ Travel booking sites / apps **Booked Activities – 1.3 months** ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

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

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

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

% OF TOTAL TRIPS: 21% — 110 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		23%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Security
ACTIVITIES	Local restaurants		41%
	Museums		30%
	Visiting local monuments		21%
KEY BEHAVIOURS	Trip to visit friends and explore a unique city. Planning more last minute		

% OF TOTAL TRIPS: 12% — 128 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		38%
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Museums		46%
	Visiting local monuments		40%
	Historical or archeological sites		33%
KEY BEHAVIOURS	Seeking to learn something new and explore local cuisine		

% OF TOTAL TRIPS: 8% — 109 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only		56%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		45%
	Outdoor markets		30%
	Oceanside beaches		25%
KEY BEHAVIOURS	Easy trip to a mild climate. Planned in advance, vacation rental or all-inclusive		

% OF TOTAL TRIPS: 13% — 132 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		51%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Security
ACTIVITIES	Local restaurants		61%
	Nature walks		22%
	Breweries		22%
KEY BEHAVIOURS	Seeking friendly and charming experiences where we can spend quality time together		

CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek rich culture and heritage, with a variety of museums and historical sites.
- We travel domestically in France and also visit other countries in Europe including Italy, Spain, and Portugal.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
France	34%	89
Spain	13%	111
Italy	7%	80
Portugal	5%	112
USA	4%	108

	SCORE	INDEX
UK	3%	139
Germany	3%	112
Greece	2%	80
Canada	2%	115
Morocco	2%	116

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	44%	115
Has a variety of museums and / or historical sites	29%	115
Provides a variety of local festivals and events	24%	143
Is inclusive and tolerant	22%	141
Has vibrant nightlife and entertainment	17%	122
Offers an energetic and dynamic cultural scene	17%	149
Has a thriving arts and music scene	17%	150
Offers an eccentric and unique atmosphere	12%	141

CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

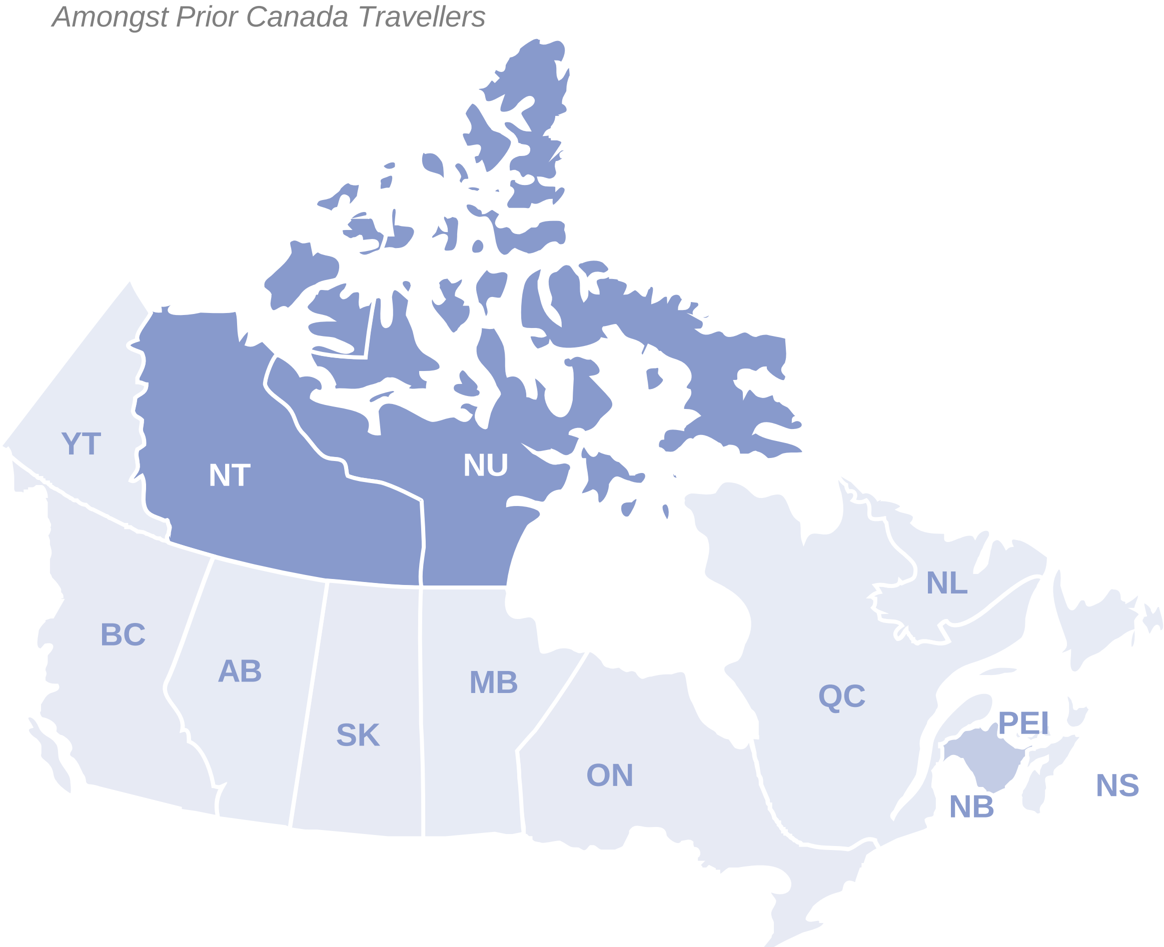
- Many of us have never visited Canada, and if we have, it was only one time.
- Our visits have focused on Ontario, Quebec and the Atlantic provinces.
- A future visit could include Quebec or Toronto.

WHERE DO WE WANT TO GO IN CANADA

MONTREAL VANCOUVER
CALGARY QUEBEC ONTARIO
OTTAWA ALBERTA TORONTO

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	5%	97
BC	6%	74
MB	5%	106
NB	8%	122
NL	3%	89
NS	8%	112
NT	3%	145
NU	3%	131
ON	28%	89
PEI	6%	105
QC	75%	97
SK	1%	81
YT	0%	94

CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- Most travel to Canada has been done during the spring and summer months.
- Overall, our knowledge of Canada as a travel destination has an opportunity to grow.
- If we have not been before, we are likely not considering a future trip.

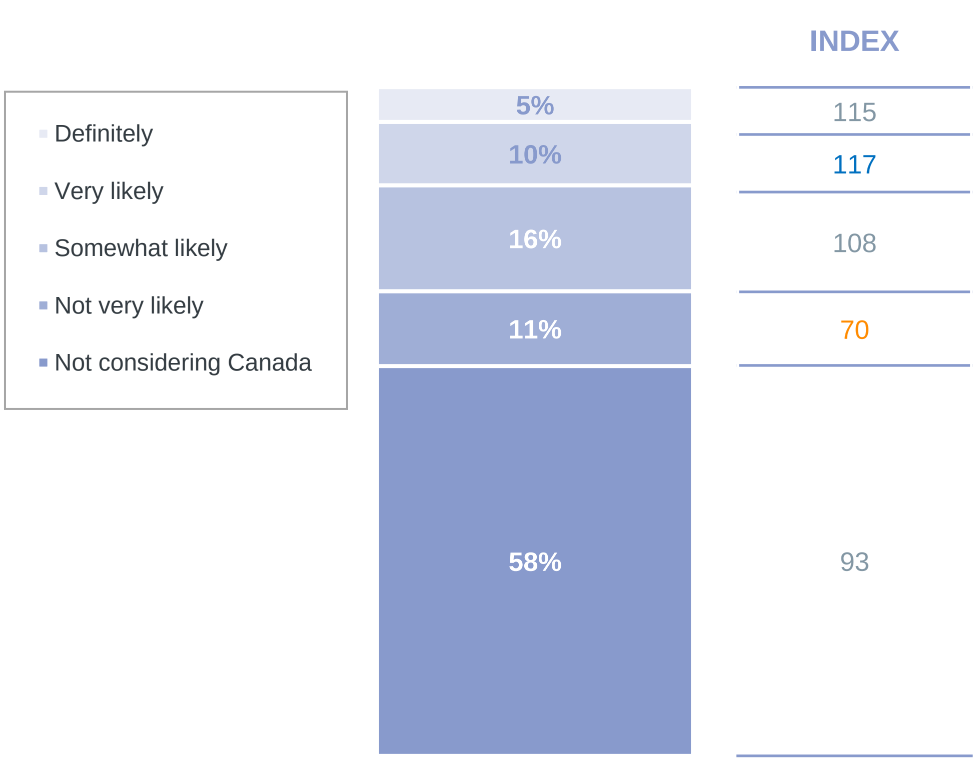
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CULTURE SEEKERS	**11%**	**27%**	**49%**	**34%**
VS. TOTAL MARKET	16%	22%	47%	30%

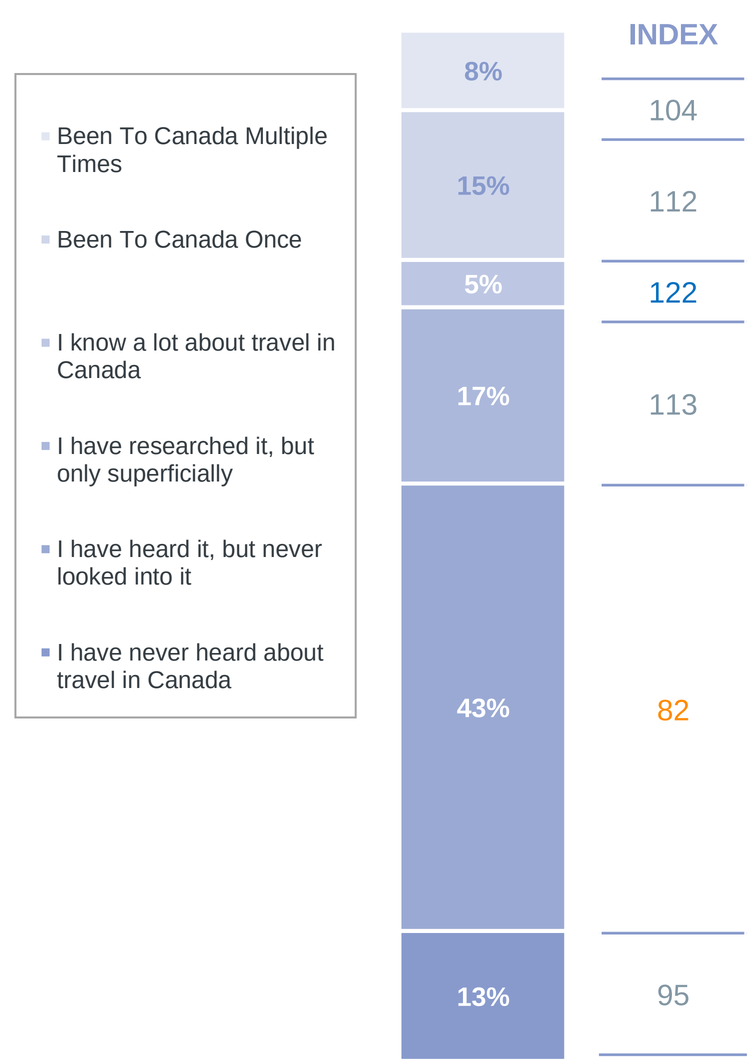
13% Been to Canada in last 5 years

114 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CULTURE SEEKERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

7%
Had a child
99 INDEX SCORE

22%
Started a new job / career
109 INDEX SCORE

12%
Bought a new home
80 INDEX SCORE

20%
Moved to a new city
116 INDEX SCORE

5%
Child started school
97 INDEX SCORE

38%
Purchased a car
71 INDEX SCORE

9%
Retired
90 INDEX SCORE

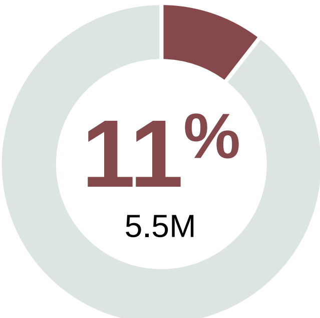
35%
Renovated house
93 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**62%**	99
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**45%**	98
Personal care and wellness	**38%**	114
Savings and investments	**37%**	77
Home and decor	**33%**	90
Fashion and accessories	**29%**	100

REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



% OF FRANCE POPULATION

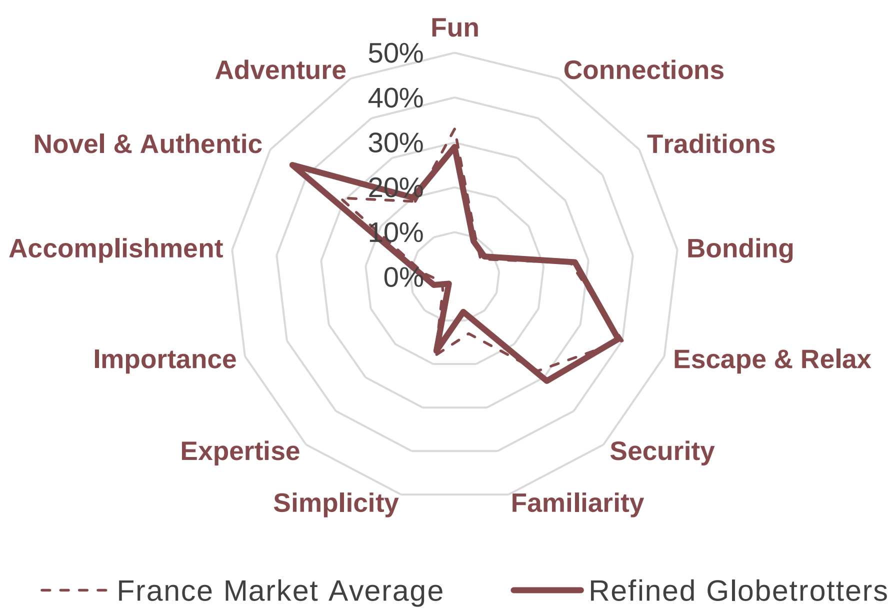
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

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

WHAT YOU NEED TO KNOW ABOUT ME

1. Travel is our #1 spending priority.
2. We have the flexibility to travel at any time of year, as our kids are grown up.
3. We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.
4. Planning how we will see all the history, museums, and architecture of a destination is paramount.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

98

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

130

How is this calculated?

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

REFINED GLOBETROTTERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm always on the look out for new destinations to visit next	**85%**	129
I like to come back from travels having learnt something new	**84%**	127
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	**82%**	131
Exploring the world through travel is an important milestone of growing up	**79%**	129
I prefer booking flights and accommodations well in advance	**75%**	146
I'm passionate about travelling	**68%**	122
I make sure to visit the "famous" sites wherever I go	**63%**	134
I tend to not think about my budget too much when travelling	**55%**	137
I enjoy joining guided tours to explore new destinations	**49%**	138
When traveling, I expect 24 / 7 support from a travel provider	**48%**	141
Luxury experiences are an important part of travel	**46%**	145
I seek travel advice from travel agencies and agents	**42%**	136
I seek out fine dining experiences and gourmet cuisine when I travel	**32%**	127

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	**59%**	136
To feel safe and secure	**40%**	121
To have authentic experiences	**40%**	122
To open my mind to new perspectives	**35%**	128
To be proud to share my travel experiences	**21%**	116
To bond through shared experiences	**20%**	124

DESIRED DESTINATION

	SCORE	INDEX
Authentic	**60%**	128
Charming	**31%**	123
Luxurious	**21%**	152
Caring	**15%**	137
Exclusive	**13%**	148
World-Class	**7%**	136

REFINED GLOBETROTTERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

AGE

	SCORE	INDEX
18-34	**15%**	74
35-54	**29%**	94
55+	**56%**	118
MEAN YEARS	**54.9**	122

HH INCOME (CAD)

	SCORE	INDEX
$50K or less	**10%**	53
>$50K to $100K	**70%**	131
More than $100K	**16%**	147
Refused	**4%**	107

EMPLOYMENT

	SCORE	INDEX
Employed FT	**49%**	95
Employed PT	**3%**	83
Self-employed	**4%**	104
Retired	**40%**	117

EDUCATION

	SCORE	INDEX
Primary education or less	**2%**	83
Secondary education	**33%**	74
Post-secondary education	**65%**	125

87%
134 Have a valid passport

GENDER

48% 98 Male

52% 104 Female

0% 85 Non-binary / Other

HOUSEHOLD

22% 92 Children <18 Living At Home*

9% 94 Children 18+ Living At Home*

40% 119 Children NOT Living At Home*

39% 99 No Children

** Option is not exclusive*

FRANCE REGION BREAKOUT

	SCORE	INDEX
Île-de-France	**25%**	127
Provence-Alpes-Côte d'Azur	**10%**	134
Languedoc-Roussillon-Midi-Pyrénées	**10%**	100
Auvergne-Rhône-Alpes	**9%**	66
Aquitaine-Limousin-Poitou-Charentes	**9%**	89
Nord-Pas-de-Calais / Picardie	**7%**	85

	SCORE	INDEX
Alsace-Champagne-Ardenne-Lorraine	**7%**	74
Normandie	**5%**	106
Centre-Val de Loire	**5%**	113
Bretagne	**5%**	100
Pays de la Loire	**5%**	85

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

145

TRAVEL TRADE INDEX: **GROUP**

128

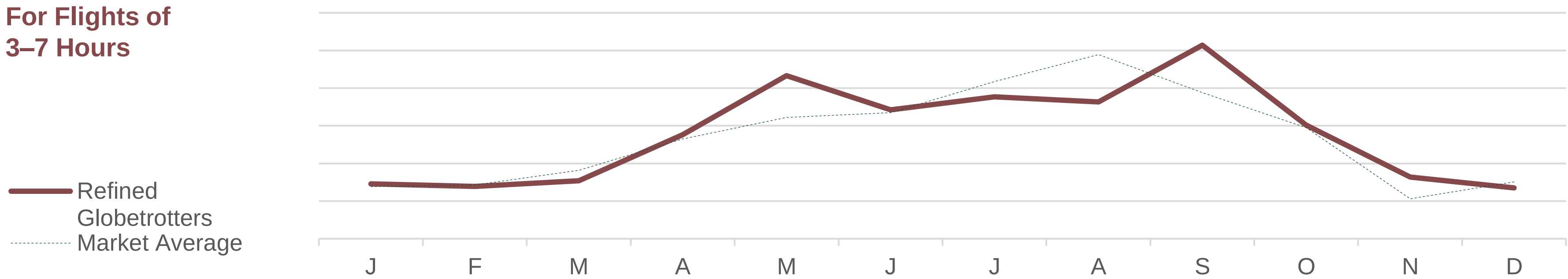
KEY terminology on this page

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

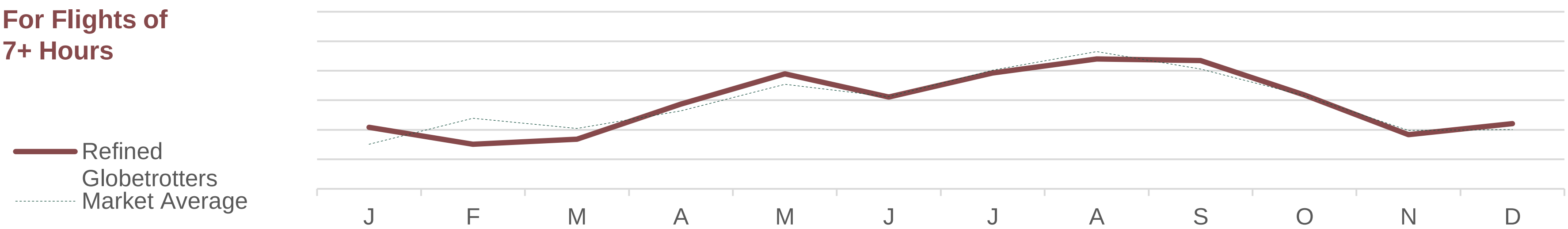
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	40%	126
3-5 Days	31%	125
1 Week Holiday	24%	113
2 Weeks Holiday	12%	102
3 Weeks Or More	6%	91

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	44%	129
International Leisure	19%	120
Business Trip	11%	115
Added Personal To Business	6%	120
Worked During Vacation	5%	101

Incidence is frequency of 2+ times per year

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Premium Hotel	**33%**	143
Mid-priced Hotel	**31%**	87
Vacation Rental (e.g., Airbnb, Vrbo)	**29%**	66
All-inclusive resort	**19%**	144
Friend's or family's place	**17%**	60
High-end / Luxury Hotel	**13%**	150

THOUGHTS ON INDIGENOUS TRAVEL

63%

105 INDEX SCORE

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

10%

119 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	**81%**	131
I really want to learn about the history of the destinations I visit	**81%**	127
I'm willing to put in the effort while travelling in order to see lesser-known places	**66%**	106
I like to explore places that are off the beaten path and less explored	**57%**	87
I'm open to travelling to destinations with limited tourist infrastructure	**44%**	81
I'm open to visiting destinations with challenging climates or weather conditions	**25%**	93

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	71%	118
Adult relatives	19%	105
Kids	14%	93
Friends	12%	98
Solo	7%	75

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,890

138
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	63%	103
Hearing from under-represented communities is an important part of travelling	57%	104
I consider the impact that I personally have on the destinations I visit	50%	89
It's important to me that I visit somewhere that is open to diversity and inclusion	47%	90
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	34%	84

39%

PRIORITIZE SUSTAINABLE TRAVEL

90 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	64%	144
○ Visiting local monuments	51%	150
○ Historical or archeological sites	46%	138
○ Museums	43%	136
Guided tours	59%	146
○ City tours	42%	145
○ Boat tours	28%	152
Local cuisine	56%	123
○ Local restaurants	50%	127
○ Luxury dining	13%	146
Shopping	28%	103
○ Souvenir shopping	17%	101
○ Luxury shopping	6%	126
Overnight experiences	15%	123
○ Staying at all-inclusive resort	7%	151
○ Cruise	6%	132
Nature experiences	36%	96
Health and wellness	25%	106
Family-focused attractions	18%	89
Festivals and events	12%	77
Winter-based sports	10%	87
Nightlife	8%	89
Water-based sports	8%	89

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	64%	108	57%	102
To learn through other cultures	51%	122	49%	104
To escape from routine	43%	103	41%	99
To spend time with family	28%	89	31%	92
For adventure and excitement	22%	93	29%	95
For a romantic getaway	18%	125	20%	142
To be pampered	16%	132	12%	133
For personal reflection and growth	9%	92	10%	91
To have memories from top travel spots	22%	107	15%	99

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	49%	106	47%	104
Visiting friends / family	19%	82	17%	79
Special event (e.g., wedding, reunion)	14%	93	16%	101
Family / friends wanted to go	21%	87	17%	95
Kids wanted to go	11%	91	15%	88
Festival or event	12%	95	6%	76

22% 92 INDEX SCORE

Travel aligns with children's school schedule

25% 89 INDEX SCORE

Take time off for vacation during major holidays

11% 80 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 5 months in advance, even for shorter distance trips.

63%

Primary Trip Planner

89
INDEX SCORE

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

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

FLIGHT OF **3–7 HOURS**	TIMELINE	FLIGHT OF **7+ HOURS**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 5.7 Months** ○ Travel agents / advisors ○ Travel guidebooks
Started Researching and Planning – 4.4 months ○ Travel agents / advisors ○ Official tourism websites	**5 MONTHS** BEFORE MY TRIP	**Booked Accommodation – 4.8 months** ○ Travel booking sites / apps **Booked Transportation – 4.7 months** ○ Direct with company
Booked Accommodation – 3.5 months ○ Through a travel agent **Booked Transportation – 3.2 months** ○ Through a travel agent **Booked Activities – 2.6 months** ○ Travel booking sites / apps	**4 MONTHS** BEFORE MY TRIP	**Booked Activities – 3.3 months** ○ Travel booking sites / apps
	3 MONTHS BEFORE MY TRIP	
	2 MONTHS BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips explore beaches and city centres, and more exclusive and luxury destinations.
- We also take trips like Simplicity Lovers and Culture Seekers.

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

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

% OF TOTAL TRIPS

52% 149 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		14%
	Urban centre		13%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Novel & Authentic
ACTIVITIES	Local restaurants		60%
	Visiting local monuments		40%
	Historical or archeological sites		30%
KEY BEHAVIOURS	Trip to a warm climate. Seeking an authentic destination to explore and learn from		

% OF TOTAL TRIPS

9% 110 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

TRIP TYPE	Luxury Resort		
COMPANIONS	Couple only		57%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Novel & Authentic
ACTIVITIES	Local restaurants		50%
	Luxury dining		47%
	Visiting famous shopping centres		28%
KEY BEHAVIOURS	Romantic all-inclusive getaway focussed on indulgence and living in the moment		

% OF TOTAL TRIPS

13% 133 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ○ ○

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only		56%
	Extended family		25%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		45%
	Outdoor markets		30%
	Oceanside beaches		25%
KEY BEHAVIOURS	An easy trip to a mild climate. Larger group, staying in vacation rental or all-inclusive		

% OF TOTAL TRIPS

13% 134 INDEX SCORE

SEGMENT ALIGNMENT

● ● ○ ○ ○

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		38%
	Alone		25%
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Museums		46%
	Visiting local monuments		40%
	Local restaurants		35%
KEY BEHAVIOURS	Seeking some hidden gems, unique culture, and stunning landscapes		

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We enjoy exploring the outdoors, with access to nature, through curated experiences.
- We travel everywhere, close to home in Europe, but over-index for most long-haul destinations.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
France	29%	81
Spain	12%	96
Italy	11%	133
USA	5%	143
Greece	5%	142

	SCORE	INDEX
Portugal	4%	81
Morocco	2%	121
Canada	2%	112
Japan	2%	105
Croatia	2%	106

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	56%	136
Known for stunning natural landscapes	50%	132
Has a variety of museums and / or historical sites	40%	139
Offers natural landscapes in close proximity to city amenities	35%	134
Renowned for food and drink experiences	25%	140
Offers all-inclusive resort packages	23%	147
Has luxury dining, shopping, and accommodations	20%	142
Has packaged holiday / vacation offers	18%	149

REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

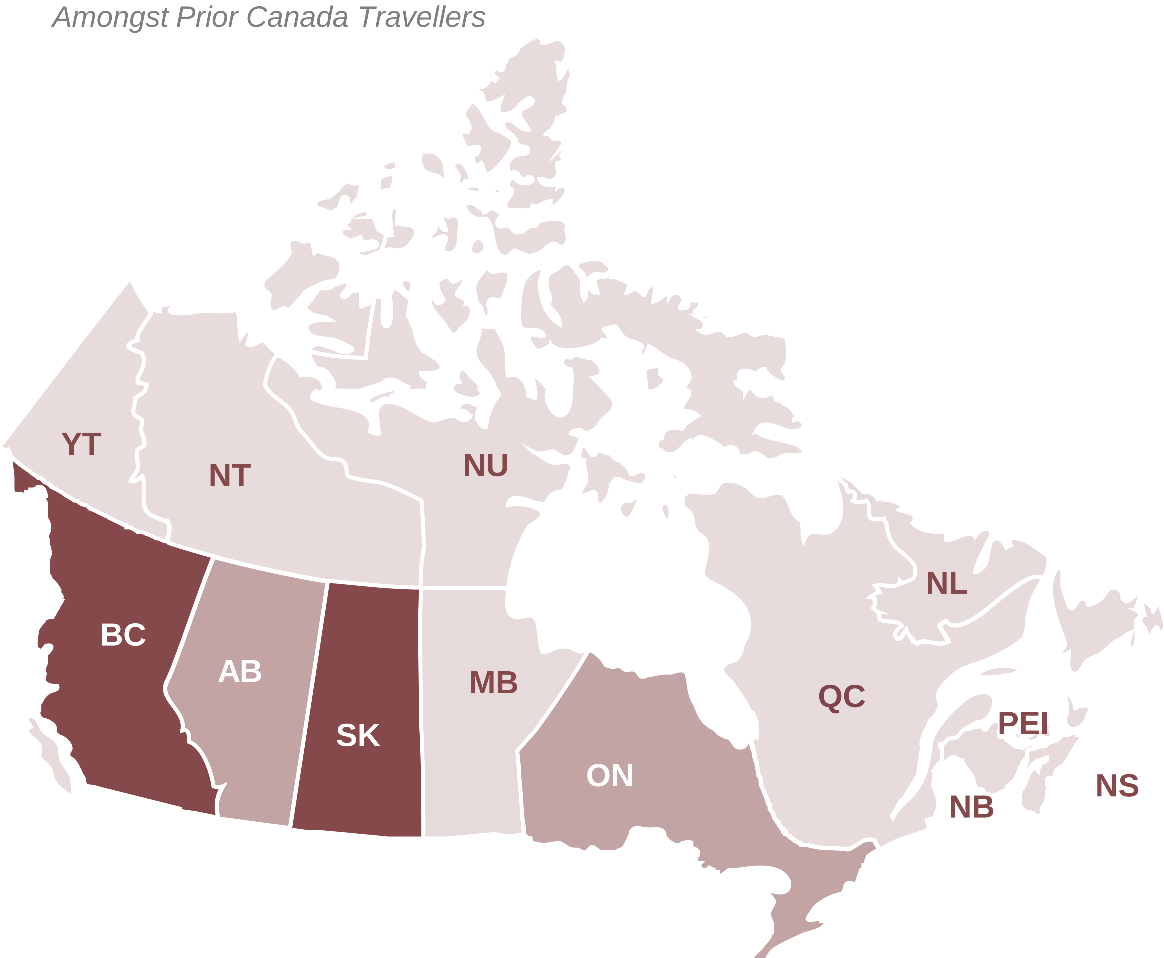
OVERALL INSIGHT

- We may have been to Canada before, but perhaps not recently.
- Overall we have visited a variety of destinations in Canada.
- Future trips to Canada will still include various destinations within Quebec.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	8%	122
BC	13%	130
MB	5%	104
NB	3%	82
NL	8%	115
NS	9%	114
NT	0%	79
NU	0%	84
ON	33%	116
PEI	2%	81
QC	75%	95
SK	4%	130
YT	0%	94

REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

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

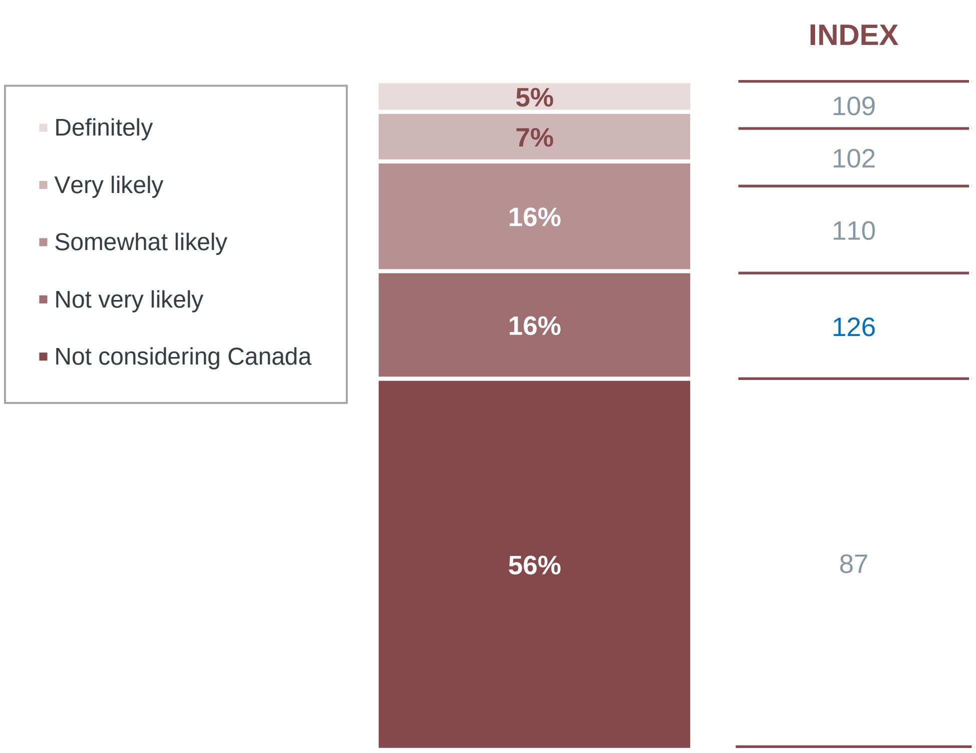
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	**13%**	**22%**	**49%**	**32%**
VS. TOTAL MARKET	16%	22%	47%	30%

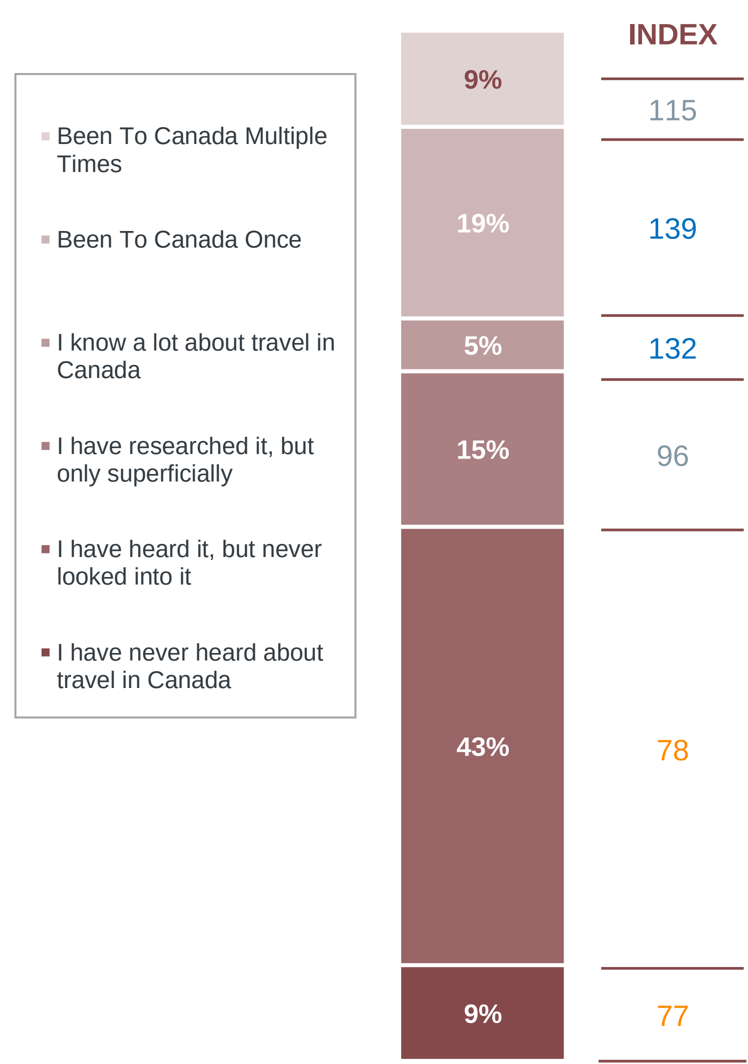
12% Been to Canada in last 5 years

113 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

4%
Had a child
88 INDEX SCORE

12%
Started a new job / career
70 INDEX SCORE

14%
Bought a new home
98 INDEX SCORE

14%
Moved to a new city
76 INDEX SCORE

3%
Child started school
89 INDEX SCORE

47%
Purchased a car
122 INDEX SCORE

13%
Retired
114 INDEX SCORE

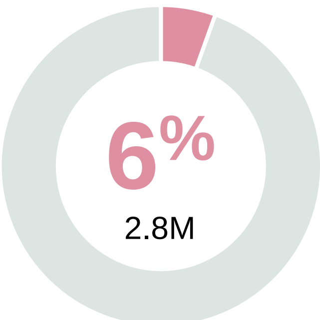
43%
Renovated house
127 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	78%	133
Savings and investments	39%	86
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	37%	71
Home and decor	36%	117
Personal care and wellness	34%	90
Fashion and accessories	25%	86

PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF FRANCE POPULATION

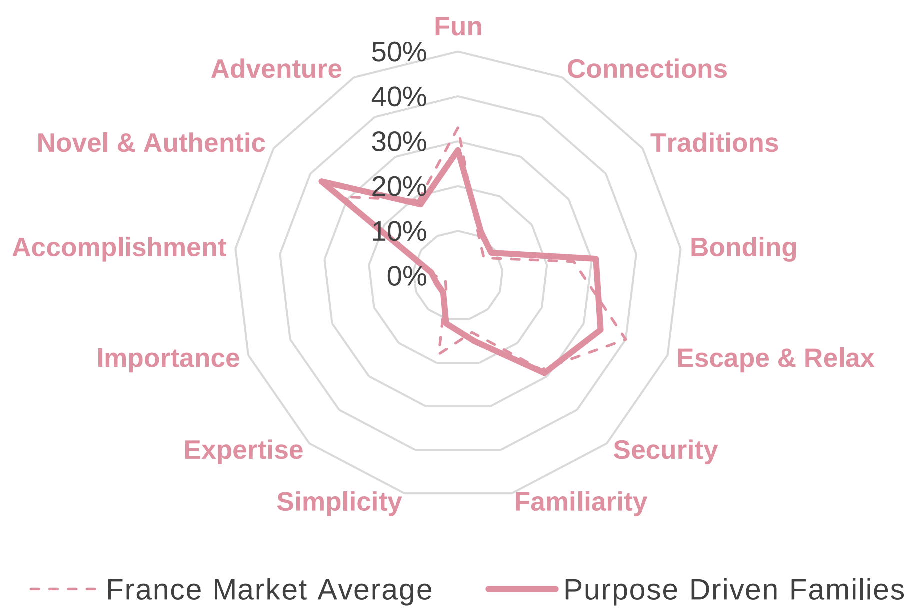
We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish trendy destinations, hidden gems that support local cultures, and anywhere that lets us spend time in nature.

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 prioritize authentic exploration that allows us to discover and learn about the world.
2. Understanding the history of the places we visit and the people we meet is important.
3. Being trendy includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.
4. Exposure to nature, exploring the outdoors, and immersing in culture make us feel fortunate.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

124

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

119

How is this calculated?

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

PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	80%	130
Trying out local cuisine is a really important part of travel	78%	146
I like to be able to take my time at a historic site or in a museum and not feel rushed	75%	112
When I travel to natural environments it makes me reflect on how fortunate I am	68%	112
I'm passionate about travelling	66%	120
I am more likely to select destinations / activities that invest in socially responsible tourism	66%	131
I generally think natural attractions are the highlights of my trip	63%	118
I go where I want to go, no matter the hurdles	52%	117
I seek out destinations where I can explore my ancestral heritage	51%	134
I learn the basics of a language before visiting a country / region	49%	121
I love posting my trips on social media to share with friends	43%	126
I seek travel advice from travel agencies and agents	36%	122
I'd be open to using AI-powered chatbots for travel planning and assistance	24%	119

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	50%	119
To have authentic experiences	37%	117
To bond through shared experiences	22%	138
To have a fun, social setting	11%	134
To create new, or take part in old, traditions	10%	128
To feel like I'm important	5%	126

DESIRED DESTINATION

	SCORE	INDEX
Unique	32%	110
Passionate	28%	140
Open	26%	123
Familiar	23%	120
Fun	21%	108
Trendy	8%	118

PURPOSE DRIVEN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are parents under 55 years of age, with kids of all ages .
- We attended post-secondary education, are working full-time, and earn high incomes.

AGE

	SCORE	INDEX
18-34	**27%**	105
35-54	**59%**	148
55+	**15%**	61
MEAN YEARS	**41.7**	67

HH INCOME (CAD)

	SCORE	INDEX
$50K or less	**17%**	85
>$50K to $100K	**69%**	122
More than $100K	**11%**	115
Refused	**3%**	74

EMPLOYMENT

	SCORE	INDEX
Employed FT	**76%**	149
Employed PT	**5%**	97
Self-employed	**2%**	78
Retired	**6%**	62

EDUCATION

	SCORE	INDEX
Primary education or less	**1%**	74
Secondary education	**29%**	59
Post-secondary education	**70%**	140

73%
103 Have a valid passport

GENDER

53% 117 Male

47% 86 Female

0% 85 Non-binary / Other

HOUSEHOLD

82% 146 Children <18 Living At Home*

9% 100 Children 18+ Living At Home*

8% 57 Children NOT Living At Home*

10% 61 No Children

** Option is not exclusive*

FRANCE REGION BREAKOUT

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Nord-Pas-de-Calais / Picardie	**8%**	88
Alsace-Champagne-Ardenne-Lorraine	**7%**	84

	SCORE	INDEX
Provence-Alpes-Côte d'Azur	**7%**	75
Pays de la Loire	**7%**	125
Normandie	**5%**	103
Bretagne	**5%**	96
Bourgogne-Franche-Comté	**4%**	117

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

101

TRAVEL TRADE INDEX: **GROUP**

124

KEY terminology on this page

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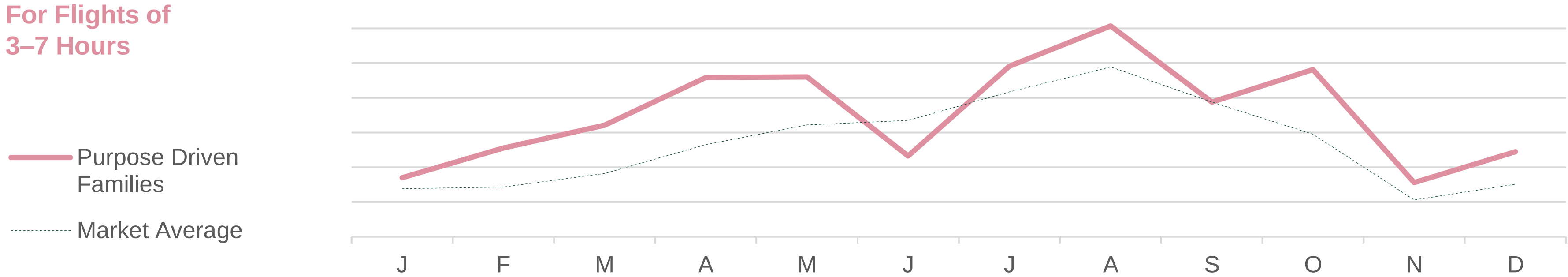
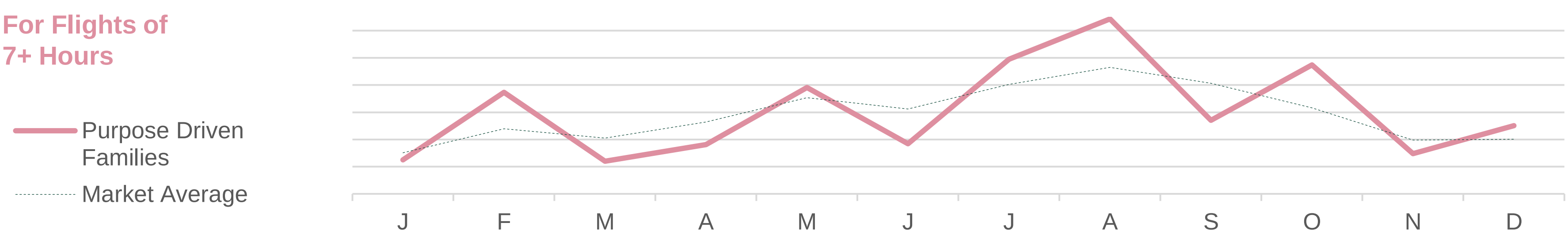
TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	37%	115
3-5 Days	28%	114
1 Week Holiday	30%	137
2 Weeks Holiday	16%	122
3 Weeks Or More	7%	112

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	42%	120
International Leisure	20%	122
Business Trip	16%	138
Added Personal To Business	8%	132
Worked During Vacation	6%	111

Incidence is frequency of 2+ times per year

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Vacation Rental (e.g., Airbnb, Vrbo)	32%	84
Mid-priced Hotel	30%	80
Friend's or family's place	22%	80
Premium Hotel	22%	106
Campsite	15%	117
All-inclusive resort	14%	116

THOUGHTS ON INDIGENOUS TRAVEL

69%

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%

127 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	75%	111
I really want to learn about the history of the destinations I visit	72%	106
I'm willing to put in the effort while travelling in order to see lesser-known places	70%	112
I like to explore places that are off the beaten path and less explored	66%	103
I'm open to travelling to destinations with limited tourist infrastructure	48%	90
I'm open to visiting destinations with challenging climates or weather conditions	31%	108

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	72%	120
Kids	67%	144
Adult relatives	19%	105
Friends	7%	80
Solo	7%	75

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,570

127
INDEX SCORE

SPEND STYLE

Premium / Upscale

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
I consider the impact that I personally have on the destinations I visit	70%	128
It's important to me that I visit somewhere that is open to diversity and inclusion	66%	123
Hearing from under-represented communities is an important part of travelling	66%	118
It's important for me to know that the money I spend will support the local economy I'm visiting	65%	111
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	57%	138

56%

PRIORITIZE SUSTAINABLE TRAVEL

124 INDEX SCORE

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

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

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We like to try the top sports in our destinations, both winter and summer focussed sports.
- Cultural education is also important.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	45%	123
○ Amusement parks or theme parks	39%	130
○ Zoos or aquariums	31%	118
○ Space or science centres	22%	151
Winter-based sports	24%	138
○ Snowboarding or downhill skiing	19%	149
○ Dog-sledding	7%	138
High-intensity sports	12%	127
○ Mountain biking	7%	128
○ Rock climbing	3%	126
Cultural experiences or attractions	49%	104
○ Museums	35%	117
○ History or culture lessons	12%	121
Local cuisine	51%	106
○ Street cuisine	20%	125
○ Cafes or bakeries	18%	129
Nature experiences	41%	104
Guided tours	39%	104
Health and wellness	26%	113
Shopping	22%	92
Festivals and events	18%	91
Casual sports	13%	117
Overnight experiences	11%	94

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	58%	138	62%	124
To relax and unwind	57%	94	39%	69
To escape from routine	27%	75	26%	56
To learn through other cultures	52%	123	43%	94
For adventure and excitement	30%	111	27%	92
To have memories from top travel spots	20%	97	26%	128
For a romantic getaway	16%	104	11%	74
To have fun with friends	13%	95	15%	99
To check off dream travel places	6%	78	10%	95

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	43%	86	49%	111
Kids wanted to go	39%	129	48%	152
Visiting friends / family	30%	108	34%	105
Family / friends wanted to go	30%	103	32%	134
Special event (e.g., wedding, reunion)	16%	102	6%	67
Festival or event	22%	120	22%	142

66% 141 INDEX SCORE

Travel aligns with children's school schedule

65% 140 INDEX SCORE

Take time off for vacation during major holidays

17% 110 INDEX SCORE

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

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

71%

Primary Trip Planner

130
INDEX SCORE

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

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

FLIGHT OF 3–7 HOURS		FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
Started Researching and Planning – 4.6 months ○ Recommendations from friends or family	**5 MONTHS** BEFORE MY TRIP	**Started Researching and Planning – 4.3 Months** ○ Travel booking sites / apps ○ Official tourism websites
Booked Accommodation – 3.0 months ○ Travel booking sites / apps	**4 MONTHS** BEFORE MY TRIP	**Booked Transportation – 3.4 months** ○ Travel booking sites / apps
Booked Transportation – 2.9 months ○ Direct with company	**3 MONTHS** BEFORE MY TRIP	**Booked Accommodation – 3.1 months** ○ Travel booking sites / apps
Booked Activities – 1.8 months ○ Through a travel agent	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 1.7 months** ○ Direct with company
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips explore new places and help us learn about the world.
- We also take trips like Culture Seekers and Simplicity Lovers.

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

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

% OF TOTAL TRIPS: 10% — 120 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Cultural Experience		
COMPANIONS	Nuclear family with kids	52%	
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Bonding
ACTIVITIES	Local restaurants	72%	
	Visiting local monuments	66%	
	Historical or archeological sites	44%	
KEY BEHAVIOURS	Planned in advance, authentic and more self-guided exploration of a new culture		

% OF TOTAL TRIPS: 12% — 128 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

TRIP TYPE	Historical Site		
COMPANIONS	Nuclear family with kids	46%	
	Couple only	33%	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Security	Escape & Relax
ACTIVITIES	Museums	55%	
	Historical or archeological sites	51%	
	City tours	41%	
KEY BEHAVIOURS	Structured with planned tours, more focus on ease and simplicity while exploring		

% OF TOTAL TRIPS: 13% — 133 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	33%	
	Alone	27%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants	54%	
	Museums	37%	
	Bars and pubs	22%	
KEY BEHAVIOURS	City trip with our partner to relax and unwind. Affordable, visiting friends in the destination		

% OF TOTAL TRIPS: 18% — 102 INDEX SCORE

SEGMENT ALIGNMENT: ●●○○○

TRIP TYPE	Extended Family		
DESTINATION TYPE	Beach resort	25%	
	Small cities and town	19%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Fun
ACTIVITIES	Local restaurants	46%	
	Souvenir shopping	30%	
	Nature walks	16%	
KEY BEHAVIOURS	Larger travel group, staying in a vacation rental, focus on family time together		

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We are looking for trendy kid-friendly access to nature and new cultural experiences.
- Most of our travel is within Europe, but we also explore various destinations in Asia.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
France	**36%**	95	Portugal	**3%**	66
Italy	**11%**	138	Belgium	**3%**	114
Spain	**11%**	88	USA	**3%**	86
Greece	**4%**	112	UK	**2%**	115
Germany	**4%**	122	Morocco	**2%**	126

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	**78%**	141
Has a rich cultural and historical heritage	**43%**	113
Provide access to unique natural wonders	**38%**	116
Has a small town feel	**23%**	145
Is inclusive and tolerant	**16%**	118
Has many hidden gems	**16%**	119
Offers an energetic and dynamic cultural scene	**9%**	109
Is a trendy destination	**8%**	113

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

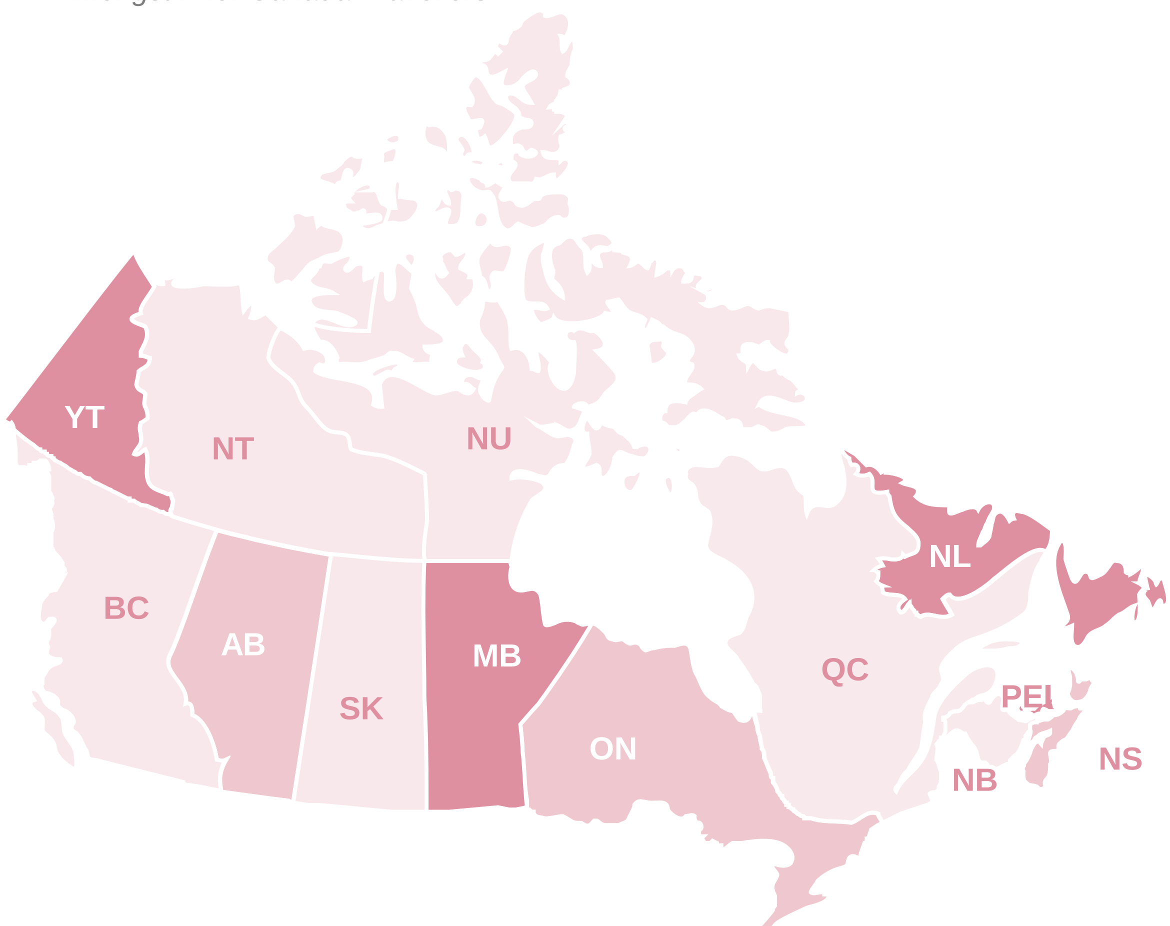
OVERALL INSIGHT

- We likely have not been to Canada before.
- Quebec in general is on our list if we decide to visit in the future, and we would also consider Vancouver.

WHERE DO WE WANT TO GO IN CANADA

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	8%	119
BC	9%	102
MB	9%	126
NB	6%	106
NL	13%	143
NS	9%	115
NT	0%	79
NU	0%	84
ON	33%	115
PEI	12%	145
QC	76%	97
SK	3%	102
YT	4%	160

PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

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

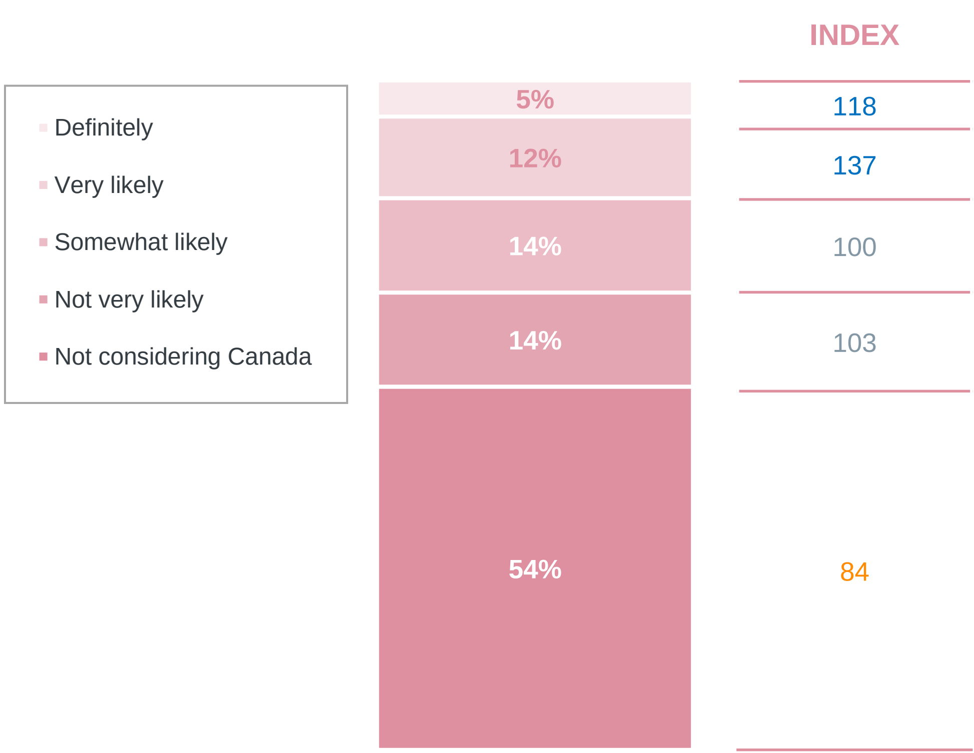
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	**20%**	**18%**	**53%**	**22%**
VS. TOTAL MARKET	16%	22%	47%	30%

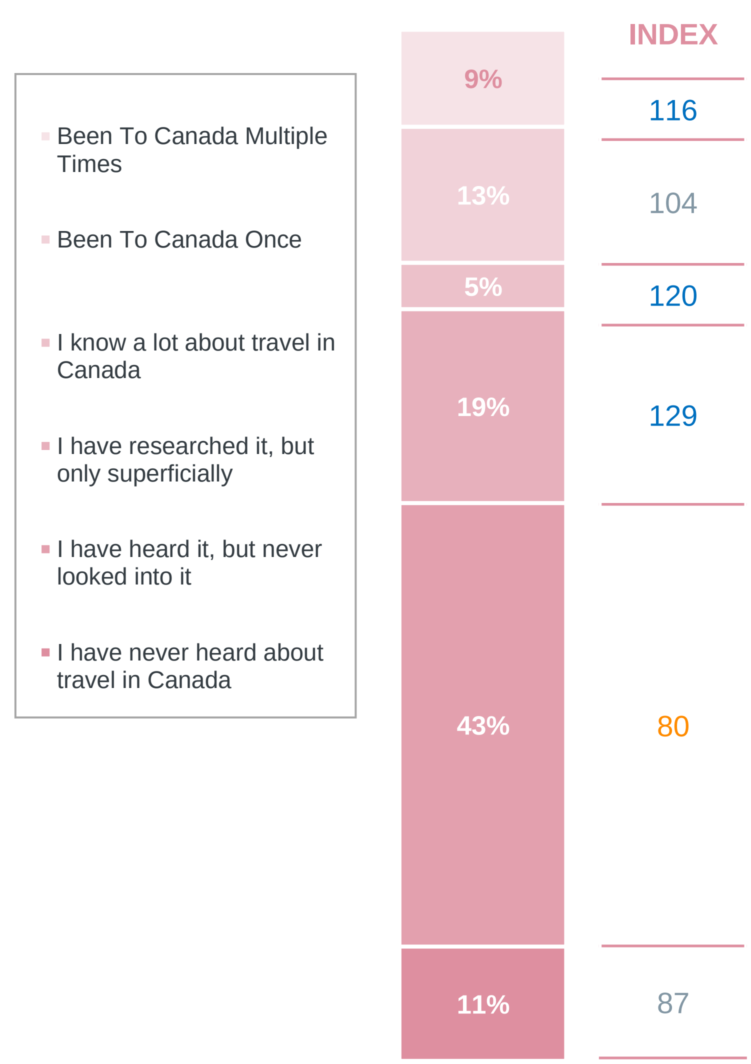
14% Been to Canada in last 5 years

119 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

20%
Had a child
142 INDEX SCORE

19%
Started a new job / career
100 INDEX SCORE

21%
Bought a new home
153 INDEX SCORE

14%
Moved to a new city
76 INDEX SCORE

21%
Child started school
142 INDEX SCORE

50%
Purchased a car
135 INDEX SCORE

2%
Retired
57 INDEX SCORE

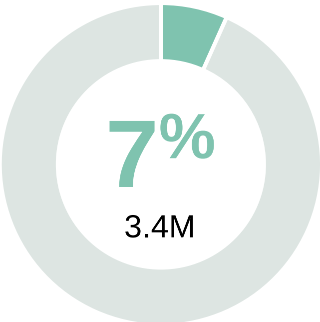
44%
Renovated house
131 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	63%	101
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	52%	120
Savings and investments	39%	88
Personal care and wellness	35%	97
Home and decor	32%	86
Fashion and accessories	29%	99

CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



% OF FRANCE POPULATION

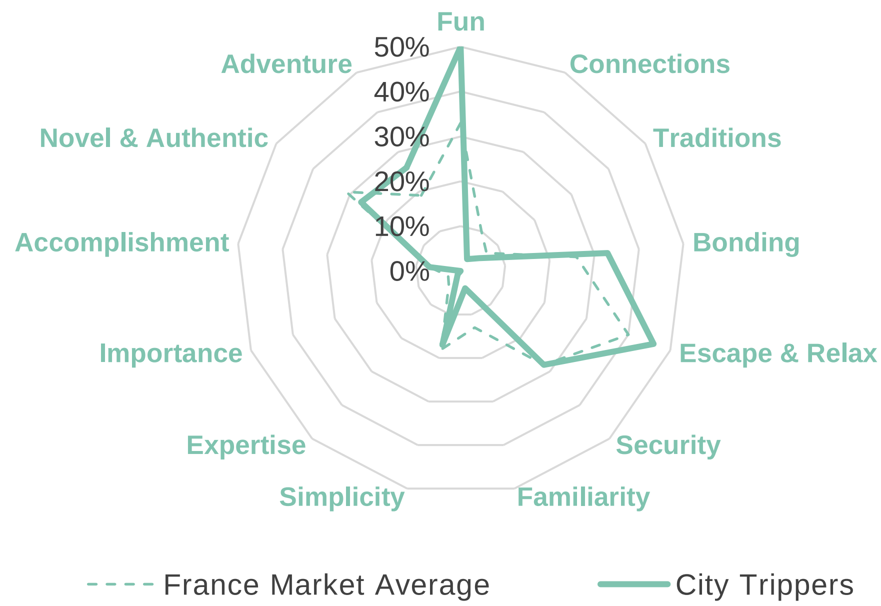
We are independent, sociable, and trendy travellers who prioritize having fun, indulging, and living in the moment. We prefer trendy, friendly locations with a variety of activities and distractions, valuing safety and ease of travel.

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

WHAT YOU NEED TO KNOW ABOUT ME

1	We prioritize fun and social settings and seek experiences that are worth sharing on social media.
2	We like to let loose, find adventure, and forget about the day to day. If a destination garners a lot of positive buzz, it heightens our desire to visit.
3	We value simplicity in our travels, preferring destinations that are easy to maneuver and travel around in. If we can save some money even better.
4	While we primarily travel as a couple or with friends, we sometimes slow down and travel with parents or extended family.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

75

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

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.
- We are attracted to trendy and established destinations with traction as popular destinations. We may be chasing an event.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	**89%**	151
I prefer destinations with well-established tourist infrastructure	**69%**	143
When there’s a lot of positive buzz about a destination it makes me want to visit it more	**62%**	142
I generally don’t think much on the impact that I personally have on the destinations I visit	**62%**	133
I like natural attractions but I don’t usually think they are the highlights of my trip	**56%**	124
Videos and pictures on social media inspire me to travel	**54%**	145
I generally stick to the most popular areas when I visit somewhere	**53%**	129
I appreciate diversity but not likely engage deeply with Indigenous cultures	**53%**	132
I will generally not go out of my way to buy local when travelling	**51%**	138
While travelling I generally stick to places that are direct and convenient to get to	**49%**	122
I’m more interested in the present and don’t focus much on the history of where I visit	**43%**	127
I love posting my trips on social media to share with friends	**42%**	124
I prefer to explore quickly and cover as much ground as possible at historic sites or museums	**40%**	157

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To indulge myself and live in the moment	**75%**	140
To share quality time with others	**54%**	146
To just enjoy myself and have fun	**52%**	150
To feel a sense of adventure	**28%**	120
To be proud to share my travel experiences	**24%**	128
To have a fun, social setting	**11%**	140

DESIRED DESTINATION

	SCORE	INDEX
Friendly	**53%**	138
Fun	**45%**	148
Charming	**33%**	133
Free-Spirited	**23%**	115
Trendy	**14%**	153
Carefree	**11%**	143

CITY TRIPPERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

68% Have a valid passport — 92

AGE

	SCORE	INDEX
18-34	**39%**	139
35-54	**26%**	88
55+	**35%**	89
MEAN YEARS	**44.3**	78

HH INCOME (CAD)

	SCORE	INDEX
$50K or less	**27%**	128
>$50K to $100K	**63%**	68
More than $100K	**6%**	75
Refused	**5%**	124

EMPLOYMENT

	SCORE	INDEX
Employed FT	**50%**	98
Employed PT	**8%**	120
Self-employed	**1%**	60
Retired	**21%**	87

EDUCATION

	SCORE	INDEX
Primary education or less	**2%**	83
Secondary education	**46%**	127
Post-secondary education	**51%**	83

GENDER

	Index	
40%	64	Male
60%	135	Female
0%	85	Non-binary / Other

HOUSEHOLD

	Index	
25%	95	Children <18 Living At Home*
10%	100	Children 18+ Living At Home*
23%	86	Children NOT Living At Home*
52%	116	No Children

** Option is not exclusive*

FRANCE REGION BREAKOUT

	SCORE	INDEX
Île-de-France	**24%**	116
Auvergne-Rhône-Alpes	**13%**	109
Nord-Pas-de-Calais / Picardie	**10%**	127
Languedoc-Roussillon-Midi-Pyrénées	**10%**	98
Alsace-Champagne-Ardenne-Lorraine	**9%**	136
Normandie	**6%**	135

	SCORE	INDEX
Provence-Alpes-Côte d'Azur	**6%**	62
Aquitaine-Limousin-Poitou-Charentes	**6%**	57
Bretagne	**6%**	119
Pays de la Loire	**4%**	80
Centre-Val de Loire	**4%**	97

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

86

TRAVEL TRADE INDEX: **GROUP**

106

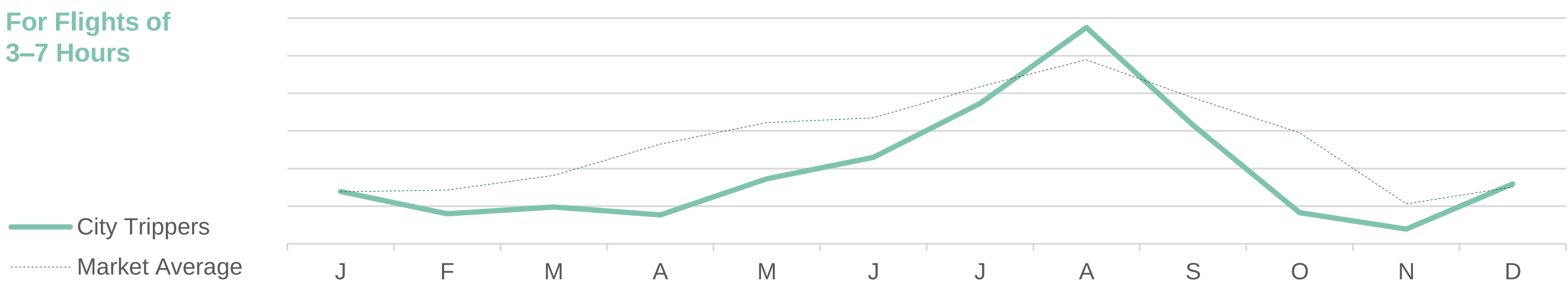
KEY terminology on this page

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

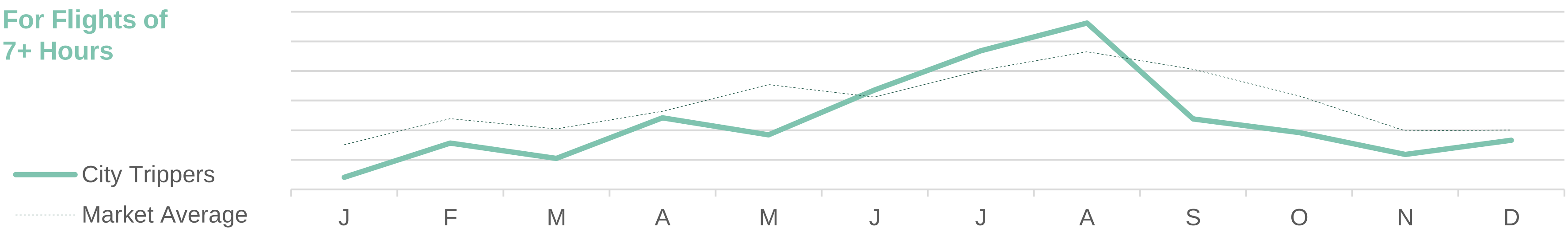
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	21%	57
3-5 Days	13%	60
1 Week Holiday	13%	71
2 Weeks Holiday	7%	71
3 Weeks Or More	5%	87

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	31%	61
International Leisure	12%	91
Business Trip	2%	71
Added Personal To Business	1%	68
Worked During Vacation	3%	81

Incidence is frequency of 2+ times per year

CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**41%**	139
Vacation Rental (e.g., Airbnb, Vrbo)	**40%**	143
Friend's or family's place	**33%**	116
Premium Hotel	**16%**	88
Campsite	**12%**	101
All-inclusive resort	**10%**	96

THOUGHTS ON INDIGENOUS TRAVEL

47%

68 INDEX SCORE

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

4%

72 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	**65%**	81
I really want to learn about the history of the destinations I visit	**58%**	73
I'm willing to put in the effort while travelling in order to see lesser-known places	**51%**	78
I like to explore places that are off the beaten path and less explored	**47%**	71
I'm open to travelling to destinations with limited tourist infrastructure	**31%**	57
I'm open to visiting destinations with challenging climates or weather conditions	**25%**	94

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**52%**	68
Adult relatives	**25%**	141
Friends	**22%**	141
Kids	**16%**	95
Solo	**13%**	103

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,340

85
INDEX SCORE

SPEND STYLE

Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	**51%**	97
It's important for me to know that the money I spend will support the local economy I'm visiting	**49%**	62
Hearing from under-represented communities is an important part of travelling	**42%**	83
I consider the impact that I personally have on the destinations I visit	**39%**	67
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**30%**	75

33%

PRIORITIZE SUSTAINABLE TRAVEL

77 INDEX SCORE

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

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

CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We enjoy shopping, dining, and definitely explore the nightlife.
- Our larger travel groups with extended family are well suited to well-known attractions.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Shopping	**53%**	156
○ Souvenir shopping	**35%**	157
○ Visiting famous shopping centres or areas	**29%**	152
○ Outdoor markets	**27%**	147
Nightlife	**38%**	152
○ Bars and pubs	**26%**	153
○ Clubs and dancing	**15%**	150
Family-focused attractions	**36%**	112
○ Amusement parks or theme parks	**26%**	110
○ Zoos or aquariums	**20%**	103
Festivals and events	**34%**	130
○ Music concerts or festivals	**23%**	135
○ Comedy festivals	**8%**	154
Water-based sports	**13%**	116
○ Kayaking, canoeing, or paddle-boarding	**6%**	123
○ Swimming	**5%**	114
Local cuisine	**52%**	109
Cultural experiences or attractions	**43%**	84
Guided tours	**39%**	104
Health and wellness	**26%**	111
Nature experiences	**21%**	68
Overnight experiences	**12%**	103
Winter-based sports	**9%**	83

CITY TRIPPERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	54%	87	62%	111
To escape from routine	56%	123	40%	97
To spend time with family	31%	93	41%	103
To learn through other cultures	23%	68	35%	78
To have fun with friends	48%	151	32%	147
For a romantic getaway	15%	100	14%	101
To have memories from top travel spots	21%	99	23%	119
For adventure and excitement	16%	80	23%	86
To check off dream travel places	20%	134	8%	88

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	40%	71	45%	98
Visiting friends / family	45%	141	42%	117
Family / friends wanted to go	51%	139	31%	130
Festival or event	28%	136	15%	113
Special event (e.g., wedding, reunion)	21%	121	18%	109
Kids wanted to go	13%	94	13%	84

23% 93 INDEX SCORE

Travel aligns with children's school schedule

30% 95 INDEX SCORE

Take time off for vacation during major holidays

15% 101 INDEX SCORE

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

CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- For long-haul trips we secure transportation and accommodation well in advance, but will wait and book later for shorter flights.

65%

Primary Trip Planner

97
INDEX SCORE

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

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

FLIGHT OF 3–7 HOURS	Timeline	FLIGHT OF 7+ HOURS
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 6.0 Months** ◦ Travel agents / advisors ◦ Recommendations from friends or family
	5 MONTHS BEFORE MY TRIP	**Booked Transportation – 4.8 months** ◦ Direct with company **Booked Accommodation – 4.5 months** ◦ Travel booking sites / apps
Started Researching and Planning – 3.7 months ◦ Travel booking sites / apps	**4 MONTHS** BEFORE MY TRIP	
	3 MONTHS BEFORE MY TRIP	
Booked Transportation – 2.7 months ◦ Travel booking sites / apps **Booked Accommodation - 2.5 months** ◦ Travel booking sites / apps **Booked Activities – 1.6 months** ◦ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 2.4 months** ◦ Travel booking sites / apps
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Most of our trips are to cities or beach destinations.
- We also take trips like Culture Seekers and Simplicity Lovers.

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

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

% OF TOTAL TRIPS

16% 98 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Friends Trip		
DESTINATION TYPE	Urban centre	**37%**	
	Beach resort	**11%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants	**40%**	
	Bars and pubs	**33%**	
	City tours	**28%**	
KEY BEHAVIOURS	Planned in advance, seeking fun and adventure with friends. Includes more organized tours and excursions		

% OF TOTAL TRIPS

23% 160 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	**32%**	
	Non-family only	**27%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Souvenir shopping	**36%**	
	Museums	**30%**	
	Local restaurants	**30%**	
KEY BEHAVIOURS	Couples trip to escape and indulge a little, but still mainting a budget. Staying in a vacation rental		

% OF TOTAL TRIPS

15% 131 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre	**23%**	
	Cultural experience	**14%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Security
ACTIVITIES	Local restaurants	**41%**	
	Museums	**30%**	
	Visiting local monuments	**21%**	
KEY BEHAVIOURS	Visiting a friendly and authentic destination to relax and explore a new culture. Higher budget.		

% OF TOTAL TRIPS

13% 89 INDEX SCORE

SEGMENT ALIGNMENT ● ● ○ ○ ○

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only	**56%**	
	Extended family	**25%**	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants	**45%**	
	Outdoor markets	**30%**	
	Oceanside beaches	**25%**	
KEY BEHAVIOURS	Easy, reliable, and affordable trip to connect with extended family		

CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek trendy locations with ease of travel, where festivals, famous attractions, an nightlife are abundant.
- We travel within France and throughout Europe. We have interest in exploring more Asian countries.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
France	34%	90
Spain	15%	138
Italy	9%	111
Portugal	5%	125
Germany	5%	142

	SCORE	INDEX
Belgium	4%	148
Greece	3%	100
Japan	3%	139
USA	3%	84
Austria	2%	135

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is easy to travel around once there	53%	129
Is easy to travel to	45%	125
Has vibrant nightlife and entertainment	25%	149
Good connectivity (Wi-Fi, cell service, etc.)	25%	142
Provides a bustling and vibrant city vibe	23%	154
Has famous attractions	20%	147
Provides a variety of local festivals and events	18%	124
Is a trendy destination	14%	150

CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

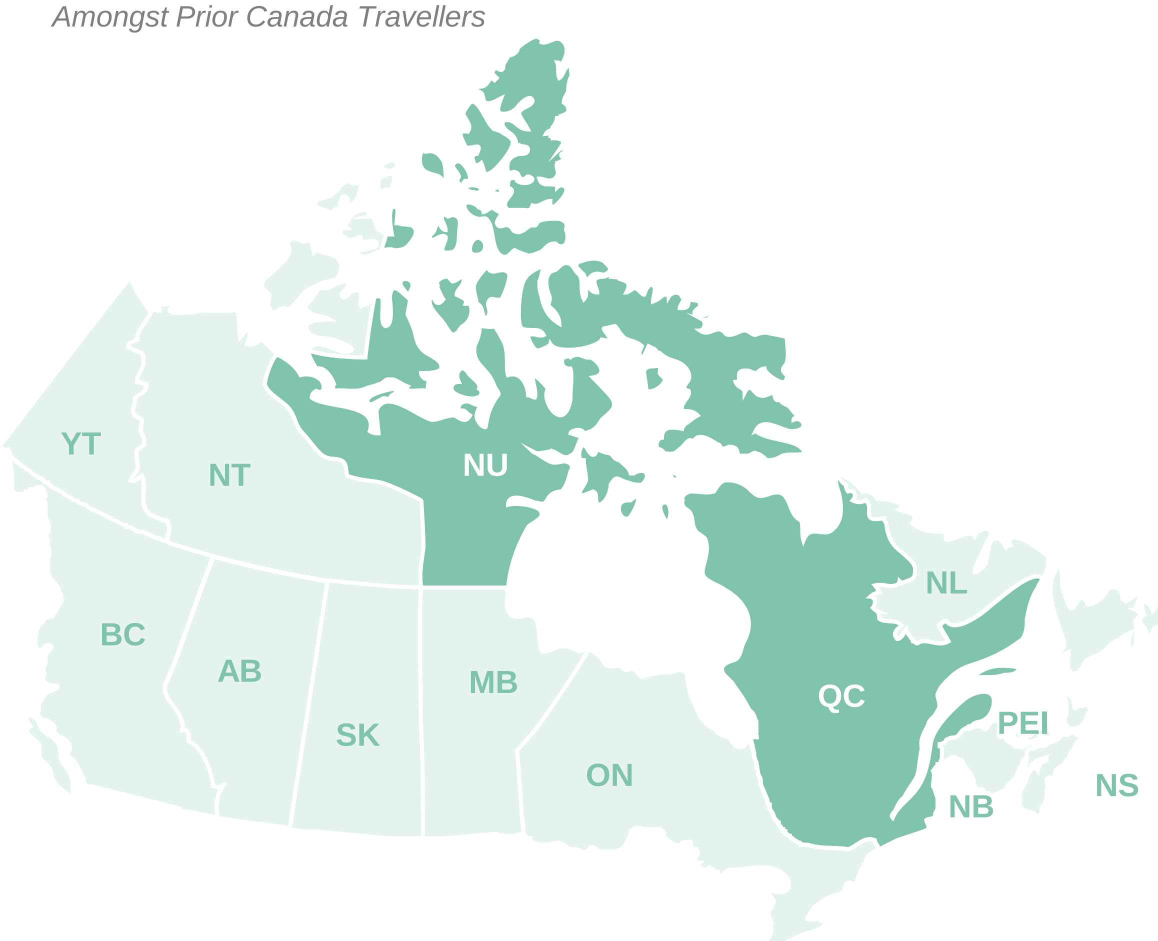
- Not many of us have visited Canada before, and if we have been it was only one time.
- Top provinces visited include Ontario and Quebec.
- A future trip would be to Quebec, but unlikely in the next two years.

WHERE DO WE WANT TO GO IN CANADA

QUEBEC
VANCOUVER
MONTREAL
OTTAWA
LAVAL
ORLEANS
TORONTO

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	0%	60
BC	9%	100
MB	0%	79
NB	3%	79
NL	4%	92
NS	0%	58
NT	0%	79
NU	3%	138
ON	29%	95
PEI	4%	89
QC	87%	139
SK	3%	108
YT	0%	94

CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- When we have visited, it has been from May to September.
- We are somewhat familiar with what Canada has to offer but we have never really looked into it too deeply.

CANADA TRAVEL MONTHS ON A PAST TRIP

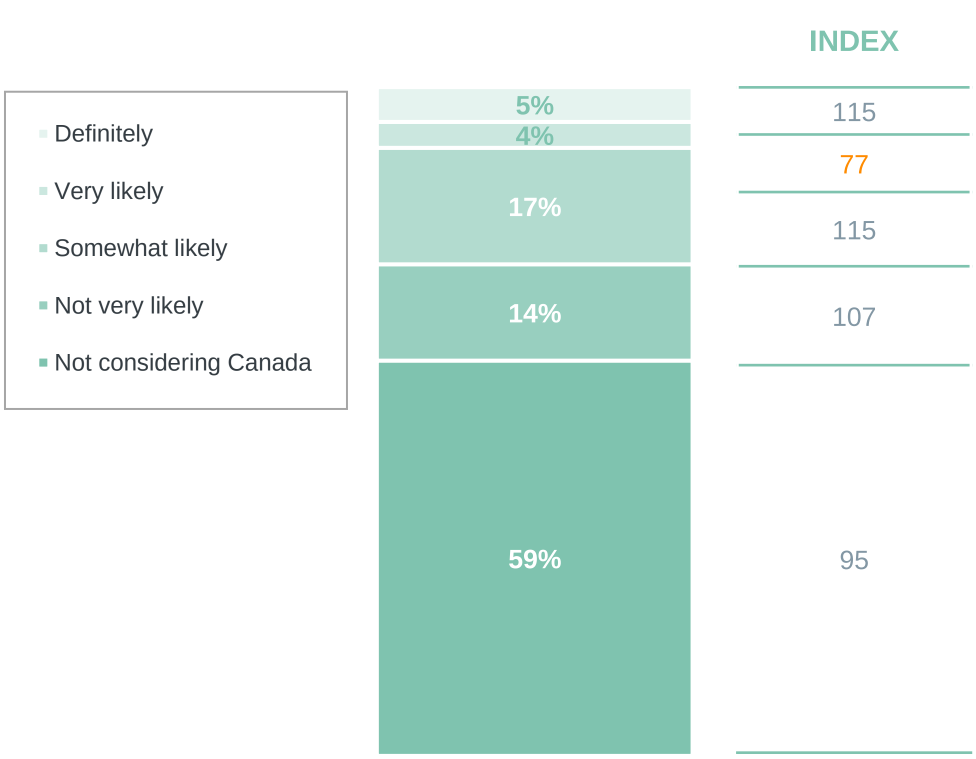
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	**9%**	**17%**	**55%**	**26%**
VS. TOTAL MARKET	16%	22%	47%	30%

6%

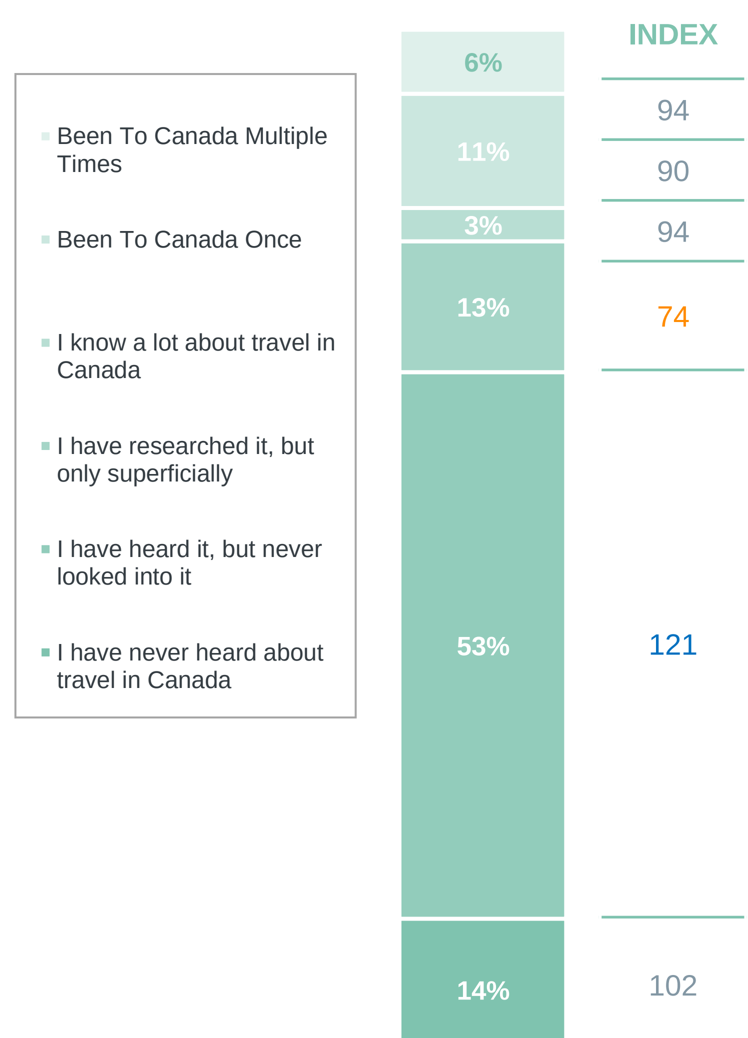
Been to Canada in last 5 years

84 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%
Had a child
97 INDEX SCORE

26%
Started a new job / career
127 INDEX SCORE

14%
Bought a new home
95 INDEX SCORE

25%
Moved to a new city
146 INDEX SCORE

6%
Child started school
98 INDEX SCORE

43%
Purchased a car
101 INDEX SCORE

10%
Retired
97 INDEX SCORE

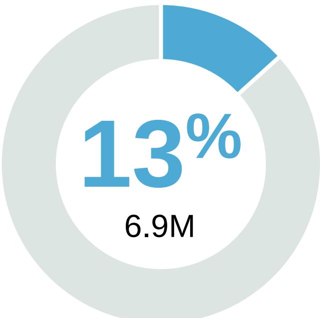
28%
Renovated house
64 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**55%**	83
Savings and investments	**46%**	117
Fashion and accessories	**44%**	149
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**39%**	79
Personal care and wellness	**39%**	116
Home and decor	**33%**	95

SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



% OF FRANCE POPULATION

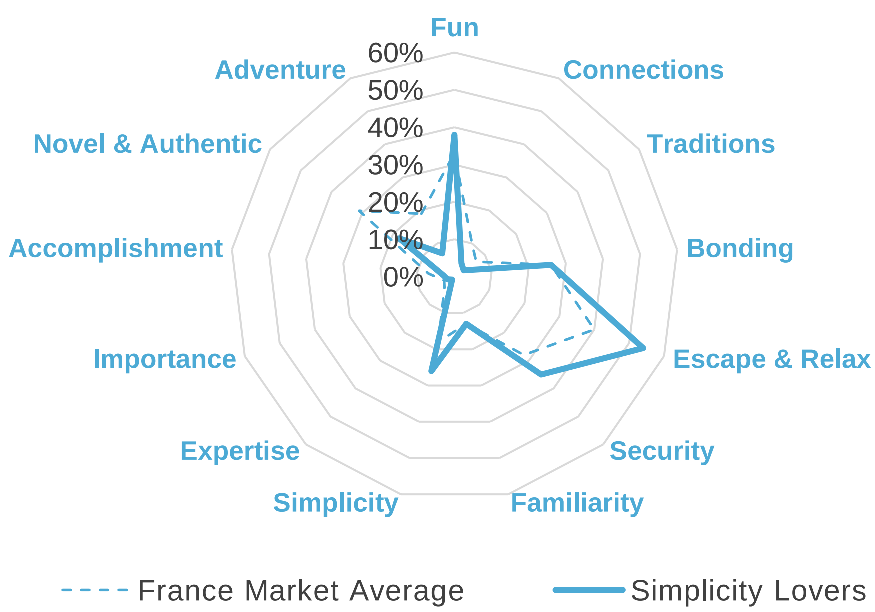
We seek peace, relaxation, and familiarity in our journeys, preferring easy and affordable destinations with a small-town feel. Prioritizing dining and nature experiences, we value simplicity and serenity.

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

WHAT YOU NEED TO KNOW ABOUT ME

1. We seek peace, relaxation, and familiarity in our travels, preferring easy, affordable destinations offering a sense of safety.
2. We like to take it slow, with low impact activities. We don't prioritize fitting in physical activity during our trips, but enjoy a quiet walk in nature to feel more relaxed.
3. Loyal to regular destinations, we 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 don't want to worry about how to navigate once we arrive. Packaged vacations are attractive.

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

70

How is this calculated?

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

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.
- We don't feel the need to travel often, but when we do it needs to be easy, direct, and reliable.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I don't generally seek out luxury experiences while travelling	87%	126
I generally only choose destinations with comfortable climate and weather conditions	86%	134
I don't see the point of posting about my trips on social media	86%	143
Quiet, relaxed experiences are how I take care of myself on vacation	81%	143
I generally avoid places that are challenging or difficult to reach	80%	134
I travel when I need to	74%	146
I seek out destinations that offer quiet opportunities for deep self-reflection	68%	132
I don't consider diversity and inclusion factors when choosing travel destinations	63%	128
I generally don't go out of my way to seek out perspectives from under-represented communities	62%	124
I generally prefer to go back to the same destinations on holiday	58%	141
While travelling I generally stick to places that are direct and convenient to get to	55%	132
I don't consider travel to be an important milestone of growing up	41%	133
You can get to know a country without experiencing its culture	39%	132

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To let loose and forget about day-to-day life	67%	134
To escape the demands of everyday life	50%	137
To find much-needed time to relax	50%	133
To feel safe and secure	45%	137
To enjoy simple, straightforward travel	42%	142
To feel confident travel with no surprises	13%	136

DESIRED DESTINATION

	SCORE	INDEX
Peaceful	65%	139
Relaxed	56%	147
Friendly	48%	122
Safe	44%	133
Practical	40%	138
Reliable	35%	133

SIMPLICITY LOVERS

OUR DEMOGRAPHICS

OVERALL INSIGHT

- We are generally aged 55+, likely retired.
- Our monthly incomes are moderate, or can be a little lower due to retirement, but our overall net worth is comfortable.
- Our kids are older or have moved out already. We are likely empty nesters.

AGE

	SCORE	INDEX
18-34	12%	68
35-54	25%	87
55+	63%	127
MEAN YEARS	57.2	132

HH INCOME (CAD)

	SCORE	INDEX
$50K or less	26%	122
>$50K to $100K	64%	78
More than $100K	6%	77
Refused	5%	119

EMPLOYMENT

	SCORE	INDEX
Employed FT	35%	66
Employed PT	5%	99
Self-employed	2%	82
Retired	50%	133

EDUCATION

	SCORE	INDEX
Primary education or less	8%	142
Secondary education	45%	120
Post-secondary education	47%	71

60%
76 Have a valid passport

GENDER

45% 86 Male

55% 115 Female

0% 85 Non-binary / Other

HOUSEHOLD

13% 85 Children <18 Living At Home*

12% 124 Children 18+ Living At Home*

45% 131 Children NOT Living At Home*

41% 102 No Children

** Option is not exclusive*

FRANCE REGION BREAKOUT

	SCORE	INDEX
Île-de-France	15%	62
Auvergne-Rhône-Alpes	15%	132
Nord-Pas-de-Calais / Picardie	10%	122
Languedoc-Roussillon-Midi-Pyrénées	10%	94
Aquitaine-Limousin-Poitou-Charentes	9%	100
Provence-Alpes-Côte d'Azur	8%	98

	SCORE	INDEX
Alsace-Champagne-Ardenne-Lorraine	8%	103
Bretagne	5%	113
Normandie	5%	103
Bourgogne-Franche-Comté	5%	128
Pays de la Loire	5%	89

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

82

TRAVEL TRADE INDEX: **GROUP**

71

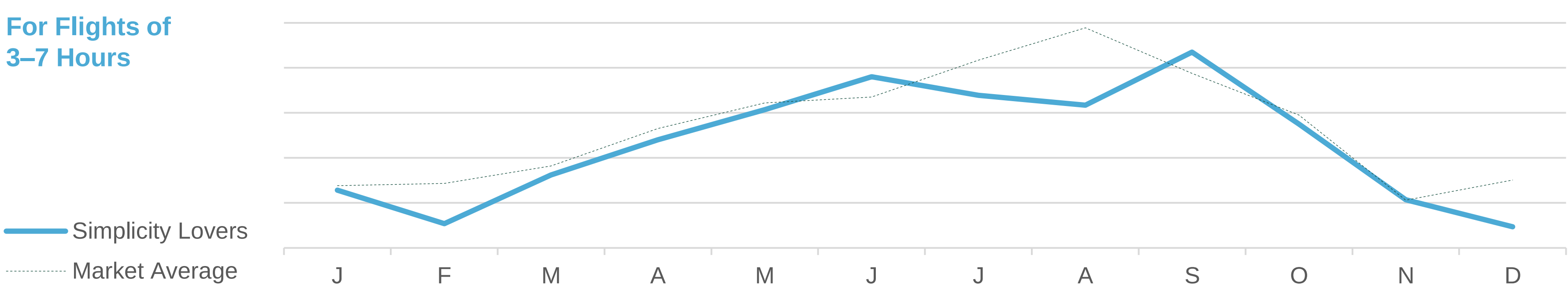
KEY terminology on this page

- **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

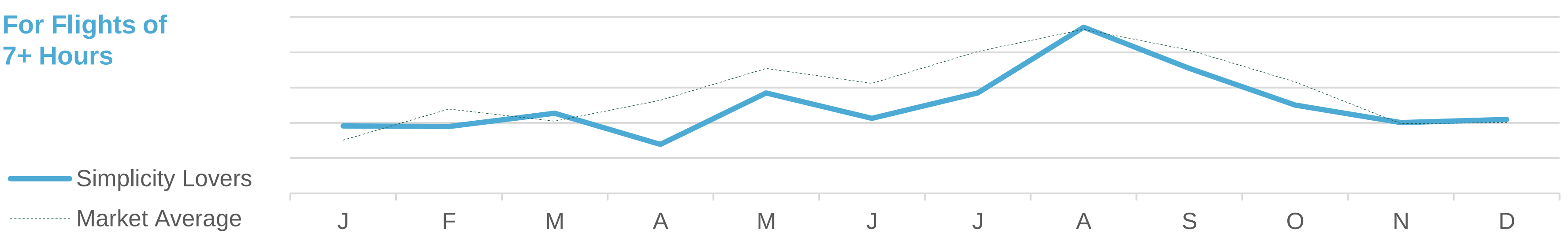
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	28%	80
3-5 Days	18%	76
1 Week Holiday	14%	74
2 Weeks Holiday	7%	72
3 Weeks Or More	4%	75

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	37%	95
International Leisure	8%	70
Business Trip	1%	71
Added Personal To Business	1%	70
Worked During Vacation	1%	70

Incidence is frequency of 2+ times per year

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Friend's or family's place	**39%**	138
Vacation Rental (e.g., Airbnb, Vrbo)	**36%**	117
Mid-priced Hotel	**33%**	97
Premium Hotel	**15%**	86
Campsite	**13%**	105
All-inclusive resort	**8%**	89

THOUGHTS ON INDIGENOUS TRAVEL

54%

82 INDEX SCORE

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

3%

70 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	**62%**	68
I really want to learn about the history of the destinations I visit	**60%**	78
I like to explore places that are off the beaten path and less explored	**55%**	85
I'm open to travelling to destinations with limited tourist infrastructure	**51%**	96
I'm willing to put in the effort while travelling in order to see lesser-known places	**45%**	68
I'm open to visiting destinations with challenging climates or weather conditions	**14%**	66

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	**69%**	113
Adult relatives	**21%**	115
Kids	**13%**	92
Solo	**11%**	95
Friends	**8%**	81

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,010

74
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	**60%**	95
I consider the impact that I personally have on the destinations I visit	**54%**	96
Hearing from under-represented communities is an important part of travelling	**38%**	76
It's important to me that I visit somewhere that is open to diversity and inclusion	**37%**	72
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**33%**	83

34%

PRIORITIZE SUSTAINABLE TRAVEL

80 INDEX SCORE

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

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

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Our top activities include spas and saunas, as well as local dining and shopping.
- We like to get outside for walks and appreciate beaches and lakes.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Health and wellness	**31%**	137
○ Spas	**19%**	132
○ Sauna or steam bath	**15%**	128
○ Outdoor hot tub or bath	**8%**	97
Local cuisine	**51%**	107
○ Local restaurants	**45%**	106
○ Breweries	**13%**	93
Nature experiences	**37%**	97
○ Nature walks	**26%**	106
○ Oceanside beaches	**21%**	108
Shopping	**27%**	102
○ Outdoor markets	**19%**	110
○ Souvenir shopping	**15%**	98
Family-focused attractions	**24%**	97
○ Zoos or aquariums	**16%**	98
○ Amusement parks or theme parks	**16%**	96
Cultural experiences or attractions	**41%**	79
Guided tours	**27%**	78
Festivals and events	**12%**	78
Casual sports	**9%**	91
Winter-based sports	**7%**	77
Overnight experiences	**6%**	62
Nightlife	**5%**	83

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	83%	147	76%	136
To escape from routine	61%	132	46%	113
To spend time with family	52%	127	71%	134
For a romantic getaway	18%	120	13%	95
To learn through other cultures	28%	78	30%	70
To have fun with friends	10%	90	21%	115
To have memories from top travel spots	12%	44	4%	71
To be pampered	16%	131	11%	126
To seek solitude and isolation	6%	92	4%	87

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	53%	121	61%	154
Visiting friends / family	27%	101	44%	120
Family / friends wanted to go	16%	79	6%	66
Special event (e.g., wedding, reunion)	10%	74	27%	142
Kids wanted to go	8%	86	19%	96
Festival or event	0%	67	4%	69

19% 89 INDEX SCORE

Travel aligns with children's school schedule

24% 87 INDEX SCORE

Take time off for vacation during major holidays

11% 78 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.

59%

Primary Trip Planner

66
INDEX SCORE

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

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

FLIGHT OF **3–7 HOURS**	TIMELINE	FLIGHT OF **7+ HOURS**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 5.6 Months** - Travel review sites
Started Researching and Planning – 4.7 months - Recommendations from friends or family	**5 MONTHS** BEFORE MY TRIP	
Booked Transportation – 3.6 months - Travel booking sites / apps **Booked Accommodation – 3.5 months** - Travel booking sites / apps **Booked Activities – 3.0 months** - Direct with company	**4 MONTHS** BEFORE MY TRIP	**Booked Transportation – 4.4 months** - Direct with company **Booked Accommodation – 4.2 months** - Travel booking sites / apps
	3 MONTHS BEFORE MY TRIP	**Booked Activities – 3.1 months** - Travel booking sites / apps
	2 MONTHS BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

DESTINATION CANADA

SIMPLICITY LOVERS

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips are seeking comfortable weather, and familiar dining and shopping. We are focused on ease of travel, peace and relaxation.
- 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: 21% — 154 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only	56%	
	Extended family	25%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants	45%	
	Outdoor markets	30%	
	Oceanside beaches	25%	
KEY BEHAVIOURS	Must have mild climate and reliable experience. Planned in advance, all about unwinding		

% OF TOTAL TRIPS: 13% — 122 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ● ●

TRIP TYPE	Countryside & Village		
COMPANIONS	Couple only	41%	
	Extended family	28%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Fun
ACTIVITIES	Local restaurants	47%	
	Hiking	19%	
	Nature walks	16%	
KEY BEHAVIOURS	Visiting family living in destination. Low-impact outdoor activities		

% OF TOTAL TRIPS: 20% — 148 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ● ●

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only	51%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Local restaurants	61%	
	Visiting local monuments	25%	
	Nature walks	22%	
KEY BEHAVIOURS	More likely to be couple only, escaping crowds. Few activities, primarily exploring dining		

% OF TOTAL TRIPS: 13% — 124 INDEX SCORE

SEGMENT ALIGNMENT: ● ● ● ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only	32%	
	Non-family only	27%	
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Souvenir shopping	36%	
	Bars and pubs	31%	
	Local restaurants	30%	
KEY BEHAVIOURS	Friends trip with focus on fun and indulgence. Planned last minute		

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are affordable, accessible, not-too crowded, and have pleasant weather.
- We take shorter trips, mostly domestic, or elsewhere in Europe.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
France	**59%**	139
Spain	**14%**	121
Italy	**8%**	86
Portugal	**5%**	119
USA	**2%**	69

	SCORE	INDEX
Germany	**2%**	84
Greece	**2%**	72
Morocco	**1%**	79
UK	**1%**	82
Croatia	**1%**	94

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	**63%**	133
Has a mild and pleasant climate	**59%**	130
Is easy to travel around once there	**53%**	128
Is easy to travel to	**53%**	137
Isn’t too crowded	**45%**	138
Doesn’t take too long to get there	**30%**	141
Provides a sense of personal safety	**28%**	146
Language is not a barrier	**27%**	122

SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

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

WHERE DO WE WANT TO GO IN CANADA

MONTREAL

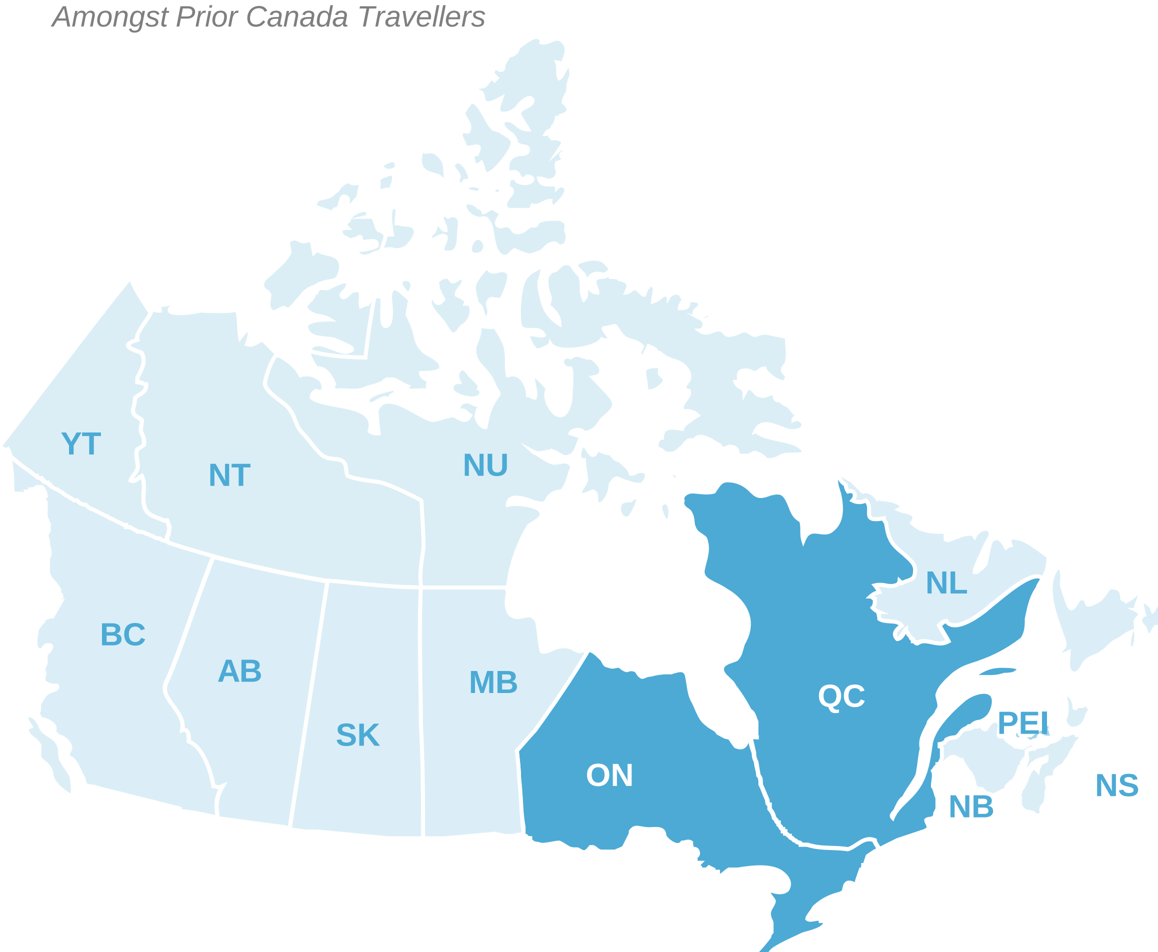
QUEBEC

OTTAWA

TORONTO

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	5%	98
BC	8%	94
MB	3%	92
NB	3%	77
NL	0%	72
NS	5%	93
NT	0%	79
NU	0%	84
ON	38%	136
PEI	5%	101
QC	88%	141
SK	0%	62
YT	0%	94

SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- If we have visited, it was many years ago.
- We gravitate to the summer season to take advantage of the pleasant weather, or fall to avoid crowds and more affordable options.

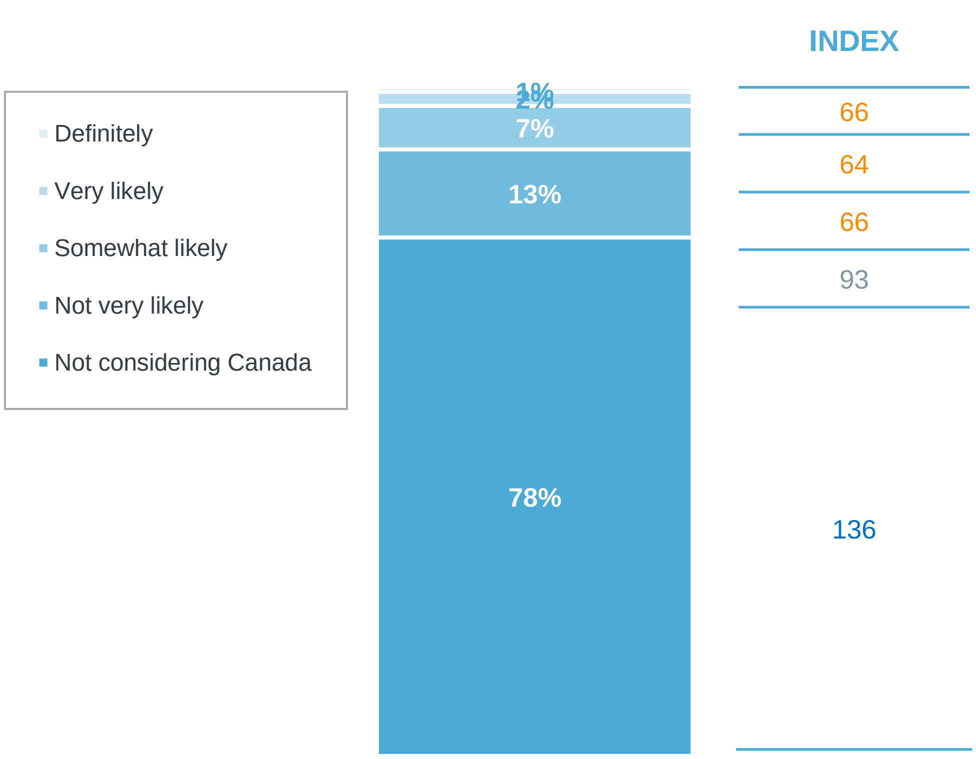
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	**20%**	**18%**	**42%**	**33%**
VS. TOTAL MARKET	16%	22%	47%	30%

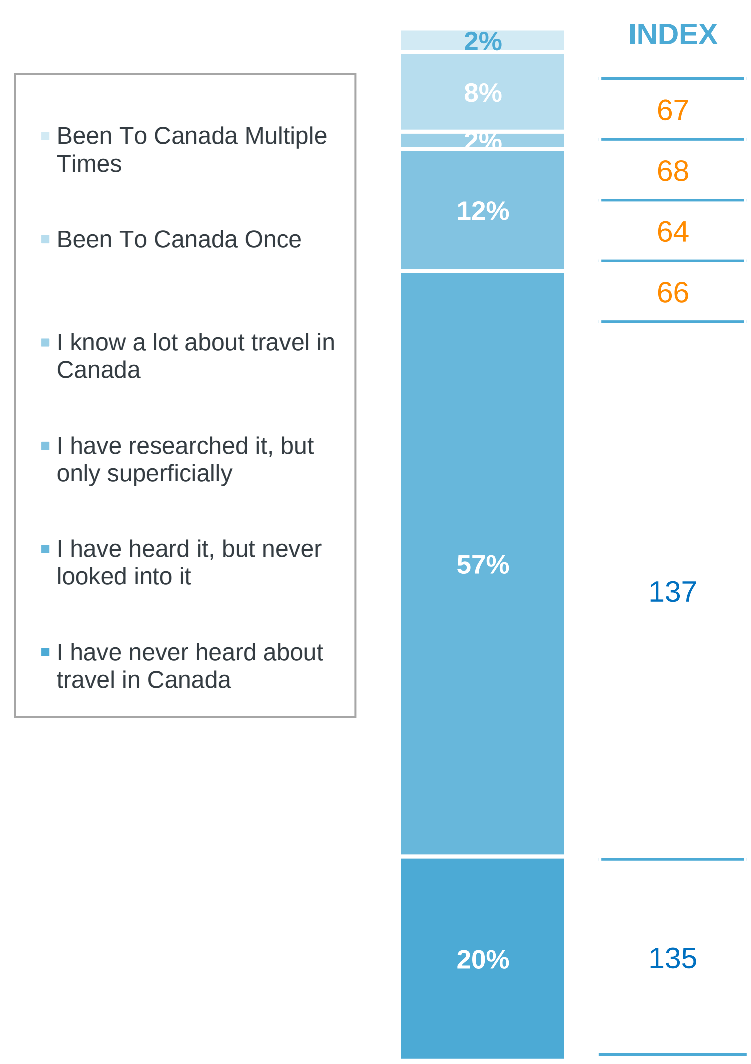
3% Been to Canada in last 5 years

66 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



SIMPLICITY LOVERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

3%
Had a child
87 INDEX SCORE

13%
Started a new job / career
73 INDEX SCORE

14%
Bought a new home
91 INDEX SCORE

16%
Moved to a new city
86 INDEX SCORE

2%
Child started school
88 INDEX SCORE

41%
Purchased a car
87 INDEX SCORE

16%
Retired
129 INDEX SCORE

36%
Renovated house
97 INDEX SCORE

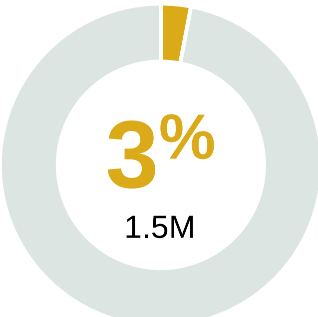
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	52%	78
Savings and investments	51%	143
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	47%	104
Home and decor	40%	139
Personal care and wellness	38%	115
Fashion and accessories	28%	94

DESTINATION CANADA

FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF FRANCE POPULATION

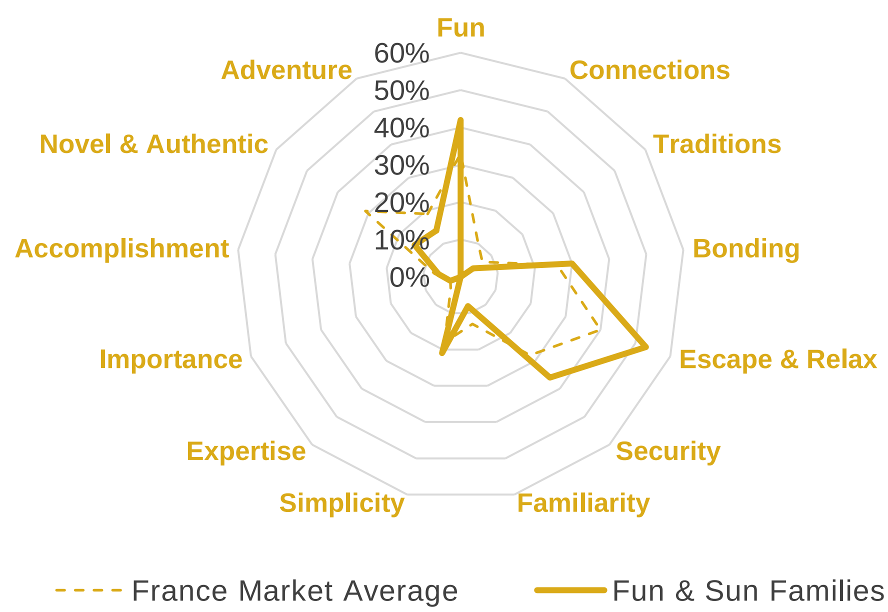
We cherish relaxation and shared family experiences in familiar, kid-friendly, and affordable destinations. We prioritize fun and simplicity over extravagance, gravitating towards well-known beaches and local spots with good communication standards.

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

WHAT YOU NEED TO KNOW ABOUT ME

1. We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences.
2. Our trips are escapes from everyday life, focusing on creating lasting memories through fun and simple activities.
3. We plan our annual vacation a few months in advance, sticking to familiar and reliable destinations.
4. Even travellingon a budget is an indulgance, as escaping our day-to-day demands is a cherished moment.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

59

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

64

How is this calculated?

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

FUN & SUN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

- We seek comfortable, entertaining destinations to escape everyday demands and enjoy quality time together.
- Prioritizing value, convenience, and relaxation, we choose practical, easily accessible hotspots.
- We focus on the present moment, and escaping everyday life is our form of indulgence.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally only choose destinations with comfortable climate and weather conditions	86%	135
I generally don't go out of my way to seek out perspectives from under-represented communities	75%	144
I try to keep a strict budget when I go on holiday	71%	136
I don't consider diversity and inclusion factors when choosing travel destinations	66%	133
I generally don't think much on the impact that I personally have on the destinations I visit	65%	139
I am not more likely to select destinations / activities that invest in socially responsible tourism	59%	143
I generally stick to the most popular areas when I visit somewhere	57%	136
I appreciate diversity but not likely engage deeply with Indigenous cultures	56%	141
While travelling I generally stick to places that are direct and convenient to get to	54%	132
I will generally not go out of my way to buy local when travelling	52%	142
I'm more interested in the present and don't focus much on the history of where I visit	48%	141
It's not important to me that I come back from travels having learnt something new	40%	152
When travelling I often go to familiar restaurants, stores, and hotels that I recognize from home	39%	149

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To indulge myself and live in the moment	67%	124
To let loose and forget about day-to-day life	63%	126
To find much-needed time to relax	51%	136
To escape the demands of everyday life	48%	131
To just enjoy myself and have fun	42%	133
To feel welcomed	35%	152

DESIRED DESTINATION

	SCORE	INDEX
Peaceful	64%	138
Practical	39%	136
Fun	38%	136
Familiar	32%	144
Sociable	24%	125
Trendy	8%	117

FUN & SUN FAMILIES

OUR DEMOGRAPHICS

OVERALL INSIGHT

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

AGE

	SCORE	INDEX
18-34	**31%**	116
35-54	**53%**	138
55+	**16%**	63
MEAN YEARS	**43.1**	73

HH INCOME (CAD)

	SCORE	INDEX
$50K or less	**18%**	86
>$50K to $100K	**70%**	131
More than $100K	**7%**	88
Refused	**5%**	131

EMPLOYMENT

	SCORE	INDEX
Employed FT	**57%**	112
Employed PT	**14%**	158
Self-employed	**3%**	96
Retired	**11%**	70

EDUCATION

	SCORE	INDEX
Primary education or less	**7%**	125
Secondary education	**43%**	113
Post-secondary education	**51%**	82

53%
60 Have a valid passport

GENDER

39% 63 Male

61% 136 Female

0% 85 Non-binary / Other

HOUSEHOLD

77% 142 Children <18 Living At Home*

4% 50 Children 18+ Living At Home*

18% 77 Children NOT Living At Home*

4% 54 No Children

** Option is not exclusive*

FRANCE REGION BREAKOUT

	SCORE	INDEX
Île-de-France	**17%**	71
Auvergne-Rhône-Alpes	**15%**	135
Nord-Pas-de-Calais / Picardie	**11%**	143
Alsace-Champagne-Ardenne-Lorraine	**9%**	139
Provence-Alpes-Côte d'Azur	**8%**	100
Aquitaine-Limousin-Poitou-Charentes	**8%**	79

	SCORE	INDEX
Languedoc-Roussillon-Midi-Pyrénées	**8%**	59
Centre-Val de Loire	**7%**	149
Pays de la Loire	**4%**	82
Bourgogne-Franche-Comté	**4%**	92
Normandie	**4%**	56

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

64

TRAVEL TRADE INDEX: **GROUP**

61

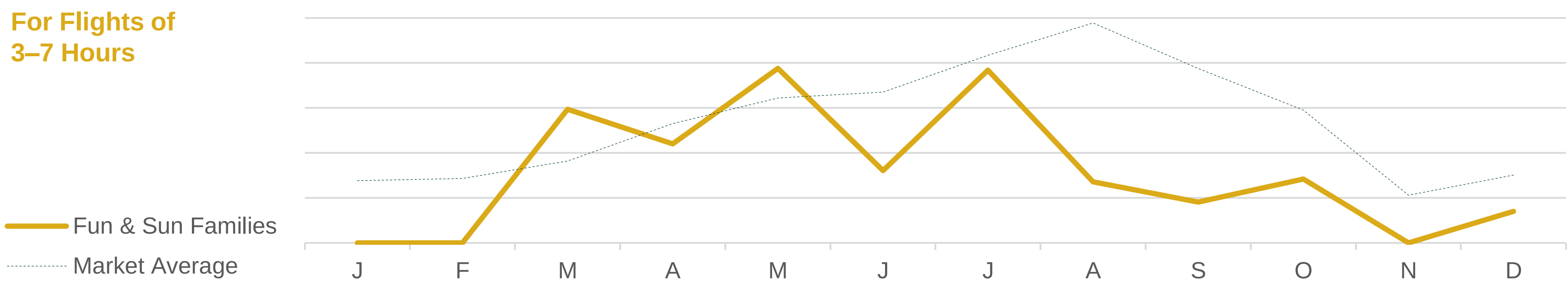
KEY terminology on this page

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

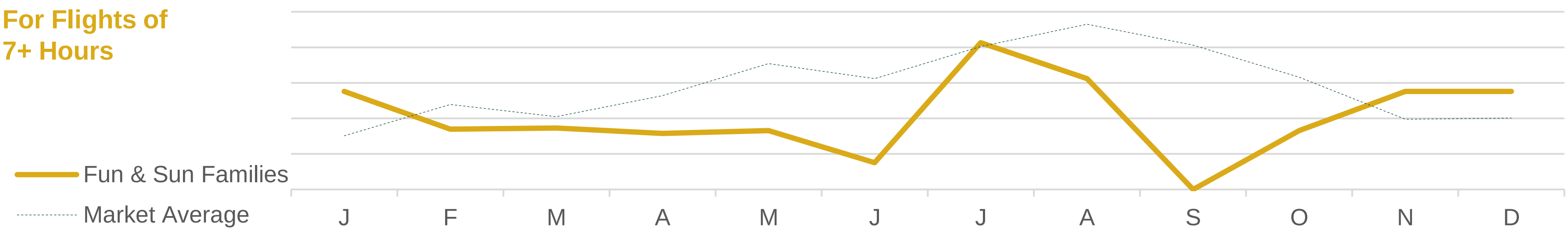
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		INDEX
1-2 Days	27%	79
3-5 Days	18%	77
1 Week Holiday	16%	80
2 Weeks Holiday	7%	69
3 Weeks Or More	2%	57

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	32%	68
International Leisure	5%	58
Business Trip	6%	89
Added Personal To Business	3%	86
Worked During Vacation	1%	69

Incidence is frequency of 2+ times per year

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	**40%**	138
Vacation Rental (e.g., Airbnb, Vrbo)	**36%**	115
Friend's or family's place	**28%**	100
Campsite	**22%**	154
Bed & Breakfast	**8%**	98
Premium Hotel	**8%**	64

THOUGHTS ON INDIGENOUS TRAVEL

44%

59 INDEX SCORE

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

4%

76 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	**61%**	66
I really want to learn about the history of the destinations I visit	**52%**	59
I'm open to travelling to destinations with limited tourist infrastructure	**46%**	86
I'm willing to put in the effort while travelling in order to see lesser-known places	**46%**	68
I like to explore places that are off the beaten path and less explored	**44%**	64
I'm open to visiting destinations with challenging climates or weather conditions	**14%**	65

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**79%**	138
Kids	**68%**	145
Adult relatives	**13%**	63
Solo	**5%**	69
Friends	**4%**	64

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,110

78
INDEX SCORE

SPEND STYLE

Value / Affordable

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	**48%**	58
I consider the impact that I personally have on the destinations I visit	**35%**	61
It's important to me that I visit somewhere that is open to diversity and inclusion	**34%**	67
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**31%**	78
Hearing from under-represented communities is an important part of travelling	**25%**	56

25%

PRIORITIZE SUSTAINABLE TRAVEL

61 INDEX SCORE

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

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

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- Family focussed attractions are the #1 priority.
- We like to try family friendly outdoor activities and explore local cuisine.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	**73%**	157
○ Zoos or aquariums	**63%**	161
○ Amusement parks or theme parks	**55%**	154
○ Space or science centres	**18%**	136
Water-based sports	**14%**	122
○ Kayaking, canoeing, or paddle-boarding	**7%**	128
○ Swimming	**8%**	145
Local cuisine	**46%**	91
○ Local restaurants	**41%**	93
○ Cafes or bakeries	**19%**	138
Cultural experiences or attractions	**42%**	84
○ Visiting local monuments	**31%**	80
○ Museums	**18%**	71
Nature experiences	**37%**	98
○ Oceanside beaches	**24%**	121
○ See or explore mountains	**15%**	103
Shopping	**27%**	102
Guided tours	**22%**	68
Festivals and events	**26%**	112
Health and wellness	**18%**	69
Nightlife	**14%**	103
Winter-based sports	**11%**	90
Casual sports	**8%**	83

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	62%	144	92%	156
To relax and unwind	77%	135	78%	140
To escape from routine	65%	138	50%	127
To have fun with friends	0%	74	8%	78
For adventure and excitement	14%	76	35%	105
For a romantic getaway	9%	53	16%	110
To learn through other cultures	20%	61	15%	43
To have memories from top travel spots	23%	112	0%	62
To seek solitude and isolation	9%	133	0%	60

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	60%	146	39%	79
Kids wanted to go	57%	155	38%	132
Visiting friends / family	42%	134	68%	158
Family / friends wanted to go	7%	64	16%	91
Special event (e.g., wedding, reunion)	7%	57	24%	132
Festival or event	7%	84	8%	85

72% 147 INDEX SCORE

Travel aligns with children's school schedule

71% 147 INDEX SCORE

Take time off for vacation during major holidays

24% 146 INDEX SCORE

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

FUN & SUN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- Our domestic trips don't require as much advance planning. For long-haul trips the destination may be decided before we really plan the details.

60%

Primary Trip Planner

70
INDEX SCORE

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

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

FLIGHT OF **3–7 HOURS**	FLIGHT OF **7+ HOURS**

7 MONTHS + BEFORE MY TRIP

6 MONTHS BEFORE MY TRIP

5 MONTHS BEFORE MY TRIP

4 MONTHS BEFORE MY TRIP

3 MONTHS BEFORE MY TRIP

2 MONTHS BEFORE MY TRIP

1 MONTH BEFORE MY TRIP

MY TRIP BEGINS!

DURING MY TRIP

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

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

FUN & SUN FAMILIES

OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

- Our top trips feature beaches and destinations known for family attractions.
- We also take trips like Simplicity Lovers and 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 14% — 128 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Countryside & Village		
COMPANIONS	Nuclear family with kids		62%
	Extended family		19%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Security
ACTIVITIES	Nature walks		34%
	Hiking		22%
	Zoos or aquariums		17%
KEY BEHAVIOURS	Exploring the outdoors in a charming and authentic destination. Staying in a vacation rental		

% OF TOTAL TRIPS 18% — 146 INDEX SCORE

SEGMENT ALIGNMENT ●●●●●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		61%
	Extended family		21%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants		50%
	Souvenir shopping		29%
	Zoos or aquariums		23%
KEY BEHAVIOURS	Easy kid-focussed fun. Not an all-inclusive, more likely camping. Planned in advance		

% OF TOTAL TRIPS 20% — 103 INDEX SCORE

SEGMENT ALIGNMENT ●●●○○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		23%
	Small cities and town		19%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Local restaurants		52%
	Visiting local monuments		25%
	Outdoor markets		21%
KEY BEHAVIOURS	A quick and easy escape to unwind with our partner		

% OF TOTAL TRIPS 13% — 125 INDEX SCORE

SEGMENT ALIGNMENT ●●○○○

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only		32%
	Non-family only		27%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Souvenir shopping		36%
	Bars and pubs		31%
	Museums		30%
KEY BEHAVIOURS	Visiting friends in a city. Exploring local attractions and experiencing some nightlife		

FUN & SUN FAMILIES

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are kid-friendly, easy to access, and has affordable options.
- We take shorter trips, mostly domestic, or elsewhere in Europe.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
France	60%	140	Thailand	3%	138
Spain	12%	104	Switzerland	3%	128
Italy	7%	80	USA	2%	75
Portugal	5%	128	Morocco	2%	111
Belgium	3%	122	Greece	2%	74

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	90%	148
Is not too expensive	64%	134
Has a mild and pleasant climate	61%	135
Is easy to travel around once there	53%	128
Is easy to travel to	44%	122
Doesn’t take too long to get there	24%	125
Good connectivity (Wi-Fi, cell service, etc.)	23%	133
Has famous attractions	14%	120

FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

- We likely haven't been to Canada before, and don't know a lot about Canada as a travel destination.
- To date, any travel to Canada has primarily been to Ontario or Quebec.

WHERE DO WE WANT TO GO IN CANADA

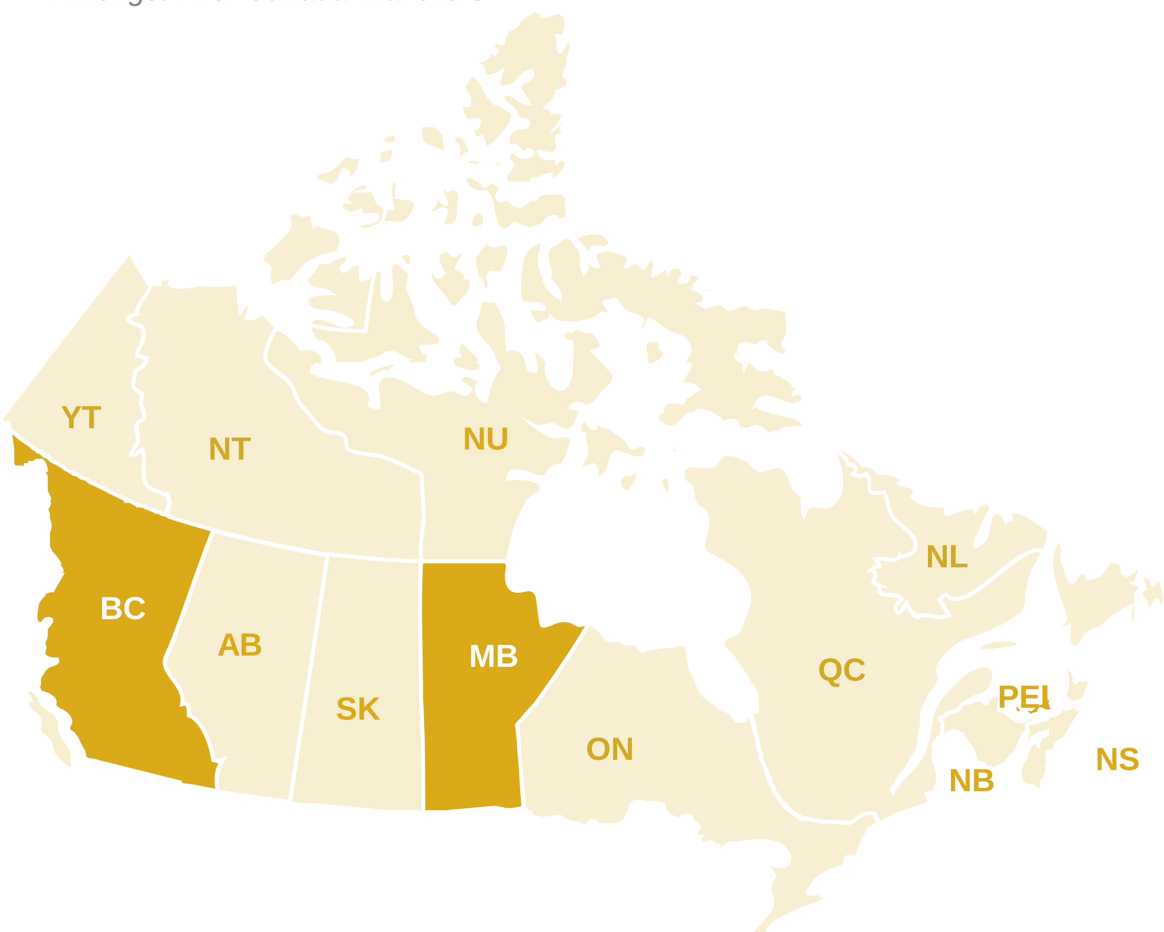
VANCOUVER

QUEBEC

MONTREAL

PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	0%	60
BC	15%	148
MB	13%	151
NB	0%	51
NL	0%	72
NS	0%	58
NT	0%	79
NU	0%	84
ON	22%	64
PEI	0%	65
QC	74%	91
SK	0%	62
YT	0%	94

FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

- If we have visited Canada it has been in summer or winter months, aligned with school schedules.
- Generally, we are not planning a future visit.

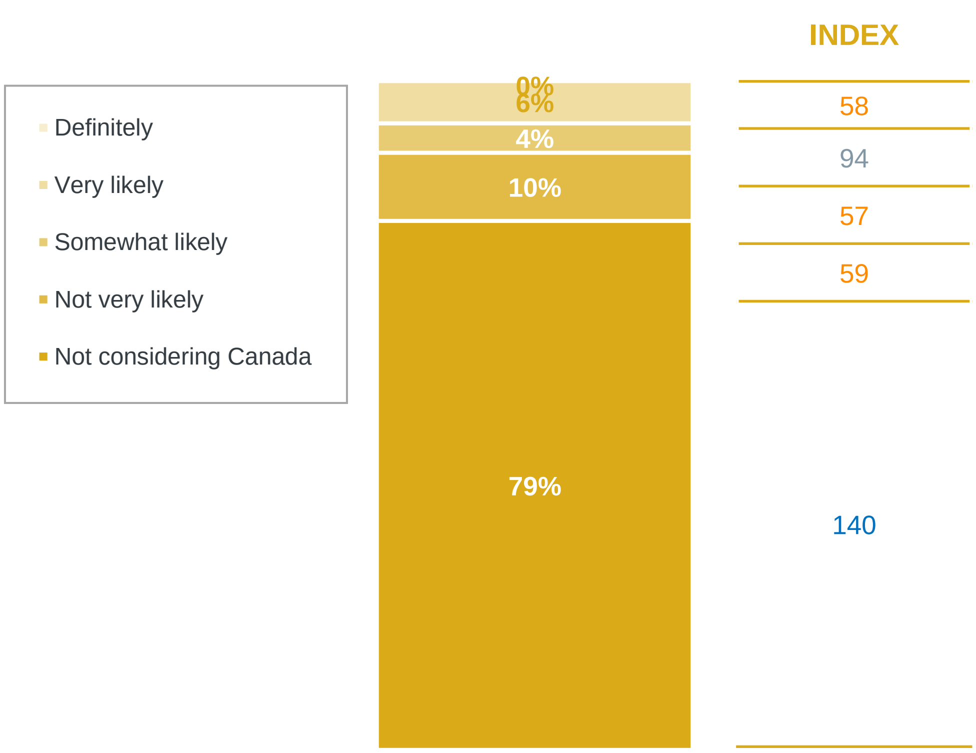
CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	**28%**	**11%**	**49%**	**13%**
VS. TOTAL MARKET	16%	22%	47%	30%

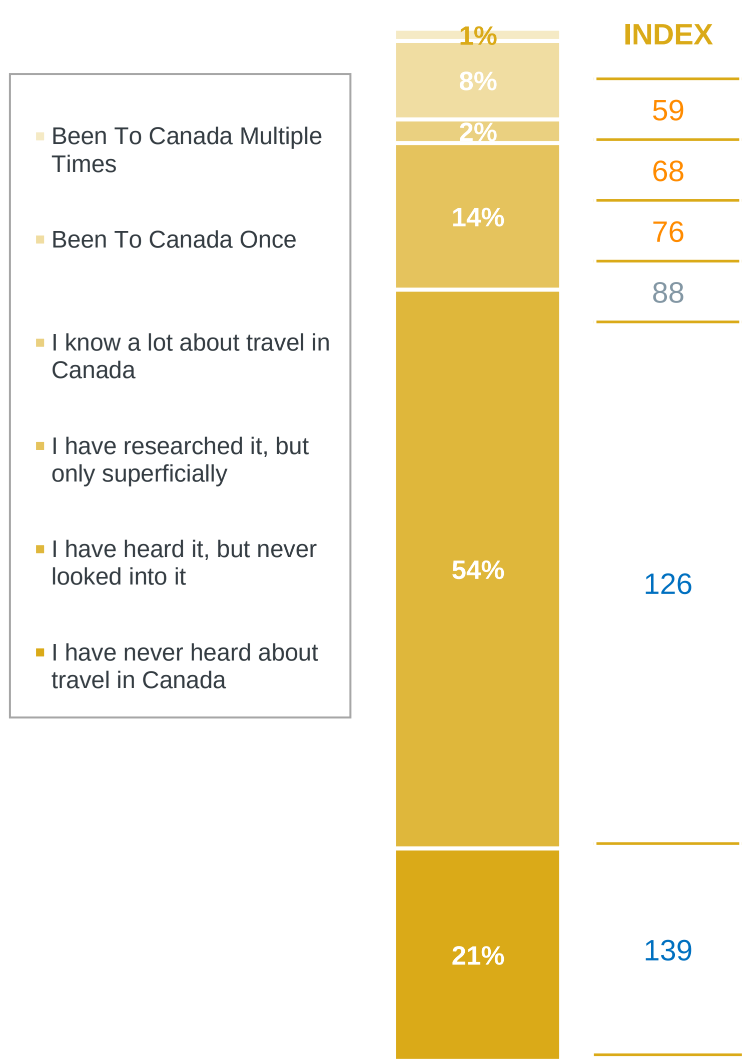
3% Been to Canada in last 5 years

66 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA



FUN & SUN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

21% Had a child — 146 INDEX SCORE

27% Started a new job / career — 131 INDEX SCORE

13% Bought a new home — 83 INDEX SCORE

19% Moved to a new city — 108 INDEX SCORE

23% Child started school — 146 INDEX SCORE

50% Purchased a car — 139 INDEX SCORE

4% Retired — 67 INDEX SCORE

30% Renovated house — 73 INDEX SCORE

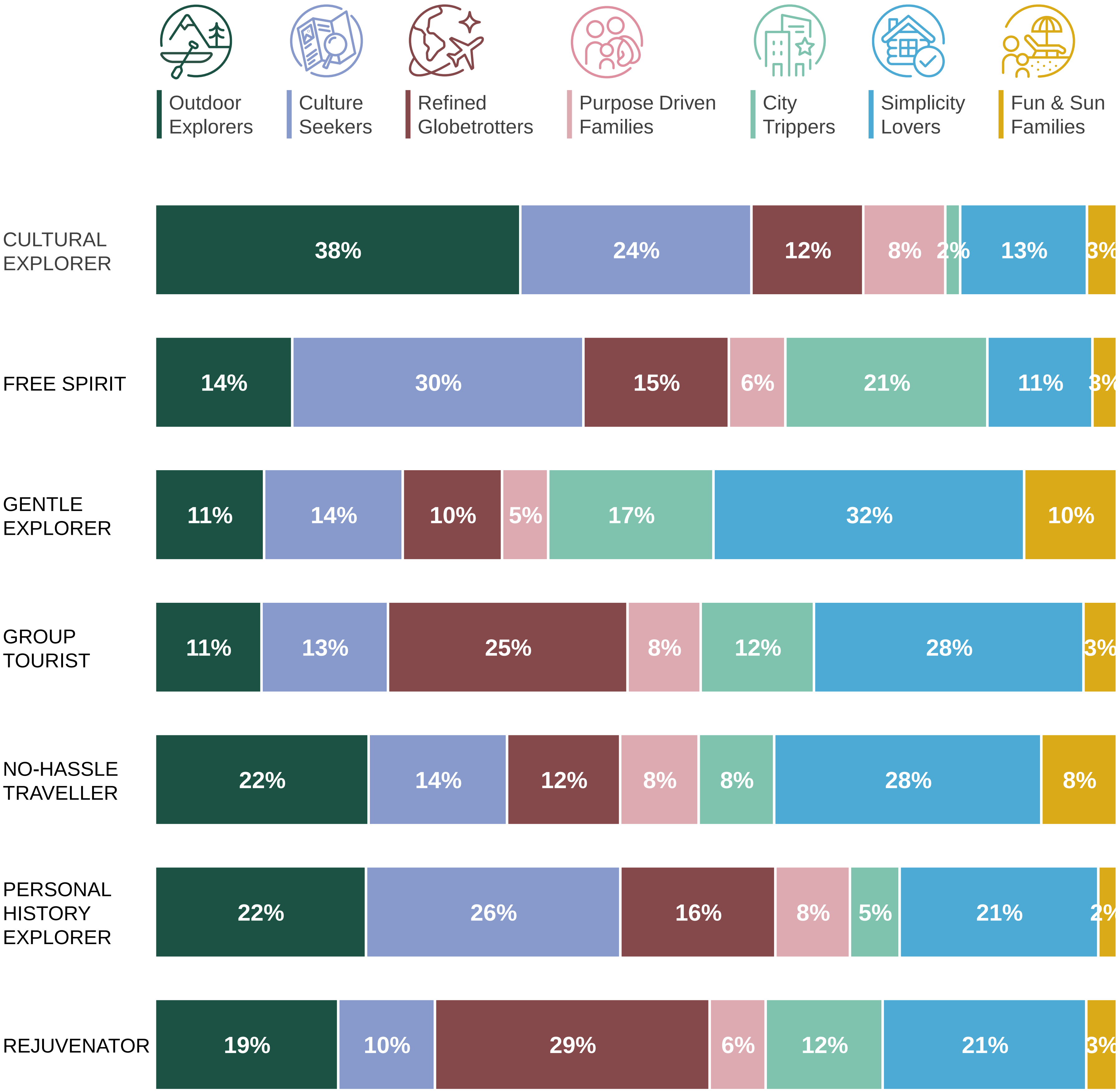
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	59%	145
Personal care and wellness	43%	141
Travel	43%	58
Fashion and accessories	39%	133
Home and decor	36%	114
Savings and investments	35%	71

EXPLORER QUOTIENT MAPPING

MARKET LEVEL SEGMENT DISTRIBUTION ACROSS EQ SEGMENTS

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



GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY

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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).