

# CANADA MARKET PROFILES

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

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



CANADA



DESTINATION  
CANADA





# A GUIDE TO UNDERSTANDING THE PROFILE



## THE STRUCTURE

### 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

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

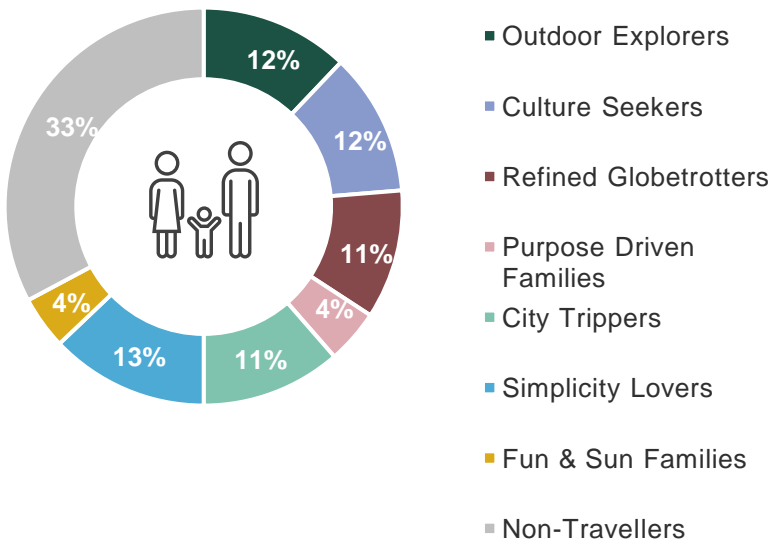
The Canadian travel market has a relatively even distribution of all segments with the highest frequency of Simplicity Lovers and Outdoor Explorers.

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

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

# MARKET SIZING

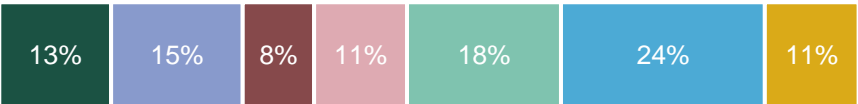
## POPULATION BREAKDOWN



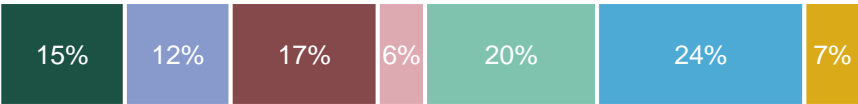
32.8% of the adult population in Canada (est. 28M) are non-travellers (est. 9M). Reasons for not travelling are often financial or health related.

## OUTBOUND TRAVELLERS' BREAKDOWN

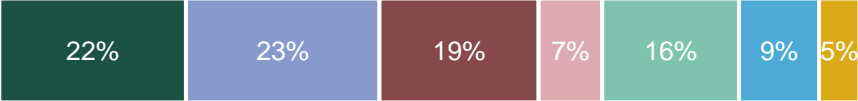
### Short-haul Travellers



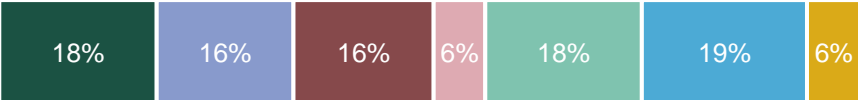
### Mid-haul Travellers



### Long-haul Travellers



### Travelled Outside Province





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

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



# MARKET SEGMENTS OVERVIEW

	Segment Size	Domestic Travel Likelihood Index	Top Travel Activities	Emotional Travel Motivations
 OUTDOOR EXPLORERS	3.4M	111	<ul style="list-style-type: none"><li>○ Nature Experiences</li><li>○ Water Sports</li><li>○ High-Intensity Sports</li></ul>	<ul style="list-style-type: none"><li>○ Adventure</li><li>○ Novel &amp; Authentic</li><li>○ Accomplishment</li></ul>
 CULTURE SEEKERS	3.2M	102	<ul style="list-style-type: none"><li>○ Cultural Experiences &amp; Attractions</li><li>○ Festivals &amp; Events</li><li>○ Cuisine</li></ul>	<ul style="list-style-type: none"><li>○ Novel &amp; Authentic</li><li>○ Connections</li><li>○ Familiarity</li></ul>
 REFINED GLOBETROTTERS	2.9M	103	<ul style="list-style-type: none"><li>○ Cultural Experiences &amp; Attractions</li><li>○ Cuisine</li><li>○ Guided Tours</li></ul>	<ul style="list-style-type: none"><li>○ Novel &amp; Authentic</li><li>○ Security</li><li>○ Bonding</li></ul>
 PURPOSE DRIVEN FAMILIES	1.3M	99	<ul style="list-style-type: none"><li>○ Family-Focused Attractions</li><li>○ Nature Experiences</li><li>○ Cultural Experiences &amp; Attractions</li></ul>	<ul style="list-style-type: none"><li>○ Bonding</li><li>○ Novel &amp; Authentic</li><li>○ Connections</li></ul>
 CITY TRIPPERS	3.2M	103	<ul style="list-style-type: none"><li>○ Shopping</li><li>○ Cuisine</li><li>○ Festivals &amp; Events</li></ul>	<ul style="list-style-type: none"><li>○ Fun</li><li>○ Escape &amp; Relax</li><li>○ Bonding</li></ul>
 SIMPLICITY LOVERS	3.6M	88	<ul style="list-style-type: none"><li>○ Nature Experiences</li><li>○ Shopping</li><li>○ Casual Sports</li></ul>	<ul style="list-style-type: none"><li>○ Escape &amp; Relax</li><li>○ Security</li><li>○ Simplicity</li></ul>
 FUN & SUN FAMILIES	1.2M	85	<ul style="list-style-type: none"><li>○ Family-Focused Attractions</li><li>○ Shopping</li><li>○ Water Sports</li></ul>	<ul style="list-style-type: none"><li>○ Escape &amp; Relax</li><li>○ Bonding</li><li>○ Fun</li></ul>

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

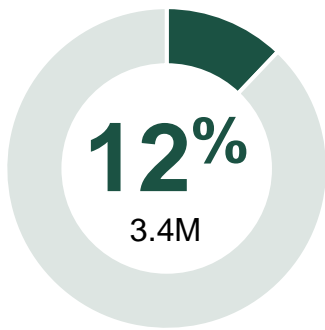
- **DOMESTIC TRAVEL LIKELIHOOD INDEX** – Indicator of the overall likelihood to travel domestically. The index is calculated using a combination of number of domestic trips per year, the likelihood of future out-of-province travel over next two years, and historical number of provinces visited. Indexed against other segments in the market.
- **EMOTIONAL TRAVEL MOTIVATIONS** – These motivations were developed using factor analysis and provide insights into what drives traveller behaviour. Understanding these motivations helps to reveal drivers of more specific values and behaviours. For more detailed definitions of each base motivation please visit the Glossary.





# OUTDOOR EXPLORERS

PSYCHOGRAPHICS – SUMMARY



## % OF CANADA POPULATION

We are daring explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions. We often seek adrenaline through physical activities, engaging with locals, and ensuring a positive impact. We embrace both short getaways and longer holidays, relishing in nature-related experiences.

### WHAT YOU NEED TO KNOW ABOUT ME

- 1

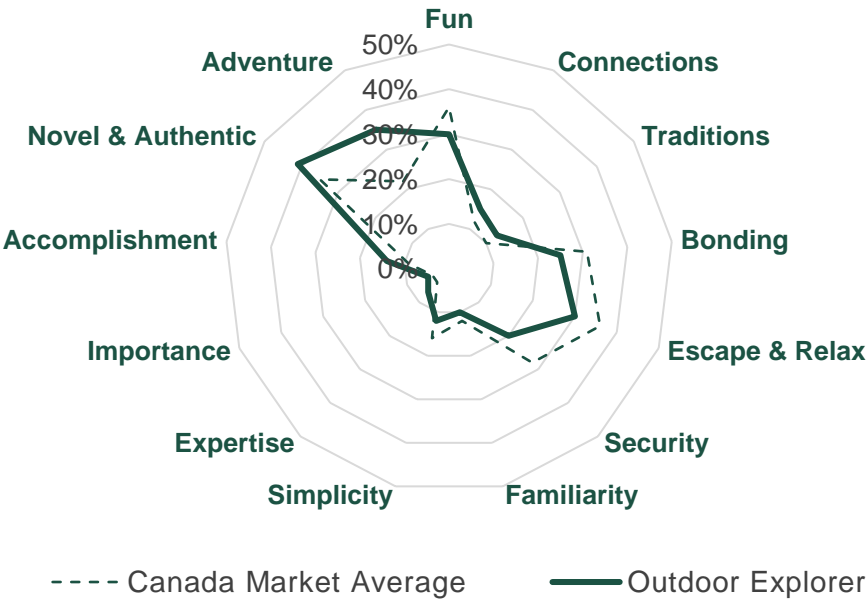
We love travel and take all types of trips (domestic / international / business / bleisure).
- 2

Beyond adventure, we also prioritize learning something new in the destinations we visit, which is part of our personal growth.
- 3

We are always eager for new, authentic experiences that require a challenge.
- 4

Like to get off the beaten path, open to visiting places with less infrastructure and more challenging climates.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

110

#### How is this calculated?

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



### TRAVELLER ECONOMIC INDEX

101

#### How is this calculated?

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



# OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

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



## TRAVEL VALUES & ATTITUDES

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



## EMOTIONAL MOTIVATIONS

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



## DESIRED DESTINATION

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



# OUTDOOR EXPLORERS

OUR DEMOGRAPHICS



## AGE

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



## HH INCOME (CAD)

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



73%

103 Have a valid passport



## GENDER

55%

111 Male

45%

89 Female

0%

100 Non-binary / Other



## EMPLOYMENT

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



## EDUCATION

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



## HOUSEHOLD

22%

97 Children <18 Living At Home\*

9%

102 Children 18+ Living At Home\*

20%

94 Children NOT Living At Home\*

57%

107 No Children

\* Option is not exclusive



## IMMIGRATION STATUS

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



## CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	39%	91
Quebec	21%	91
British Columbia	16%	120
Alberta	12%	114
Saskatchewan	5%	129

	SCORE	INDEX
Manitoba	4%	91
New Brunswick	2%	104
Nova Scotia	2%	88
Newfoundland and Labrador	1%	97
Prince Edward Island	0%	81



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

## TRAVEL TRADE INDEX: NON-GROUP

88

## TRAVEL TRADE INDEX: GROUP

102

**! KEY** terminology on this page

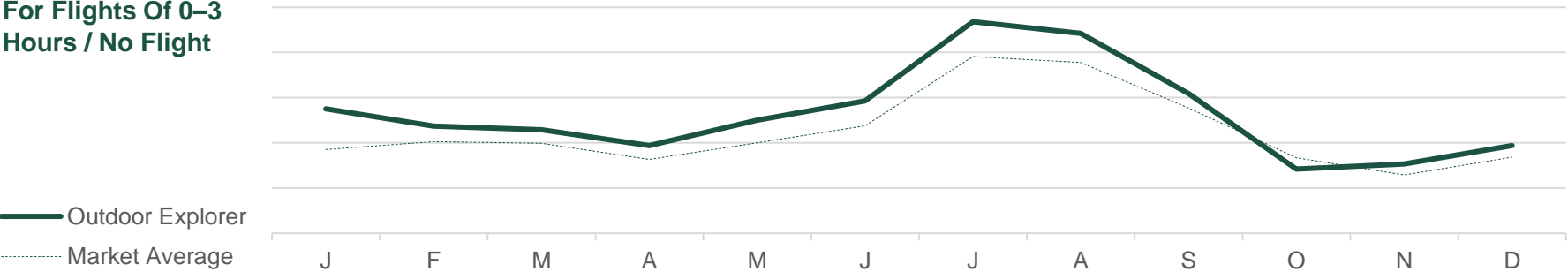
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).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

For additional definitions see [Glossary](#)

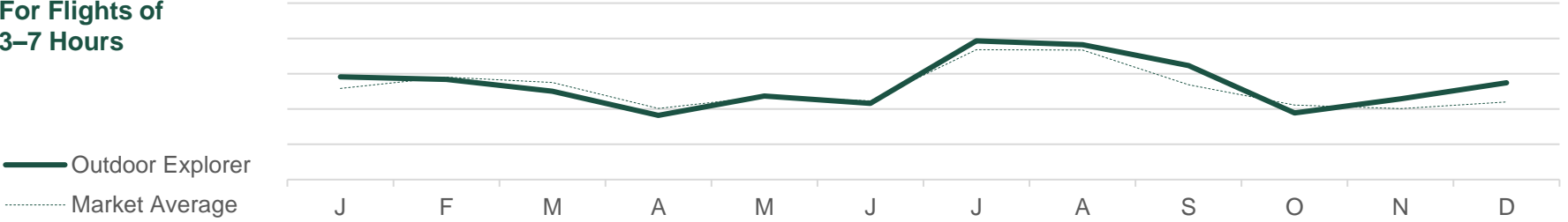


### TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



### TRIP DURATION

INDEX

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

Incidence is frequency of 2+ times per year



### TRIP TYPE

INDEX

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

Incidence is frequency of 2+ times per year





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

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



## THOUGHTS ON INDIGENOUS TRAVEL

56%

118 INDEX SCORE

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

12%

126 INDEX SCORE

Strong Interest In Indigenous Activities



## WILLINGNESS TO LEARN AND EXPLORE

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



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

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



## TRAVEL COMPANIONS

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



## BUDGET

### AVERAGE SPEND SHORT-HAUL

**\$1,750** 97 INDEX SCORE

### AVERAGE SPEND MID-HAUL

**\$2,530** 106 INDEX SCORE

### SPEND STYLE

Mid-range



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

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

42%

## PRIORITIZE SUSTAINABLE TRAVEL

116 INDEX SCORE



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

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



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES















## OVERALL INSIGHT

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



## TOP DESIRED TRAVEL ACTIVITIES

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



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	55%	82	48%	66
For adventure and excitement	48%	137	58%	143
To escape from routine	37%	79	35%	76
To spend time with family	31%	83	32%	94
To learn through other cultures	26%	108	32%	104
To have fun with friends	23%	94	22%	100
To check off dream travel places	21%	103	26%	111
For personal reflection and growth	13%	133	10%	114
To have memories from top travel spots	13%	150	10%	109



## EXTERNAL TRIP TRIGGERS

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

18% 98  
INDEX SCORE

Travel aligns with  
children’s school schedule

23% 99  
INDEX SCORE

Take time off for vacation  
during major holidays

15% 104  
INDEX SCORE

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





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – HOW WE PLAN

## OVERALL INSIGHT

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

63%

Primary Trip Planner

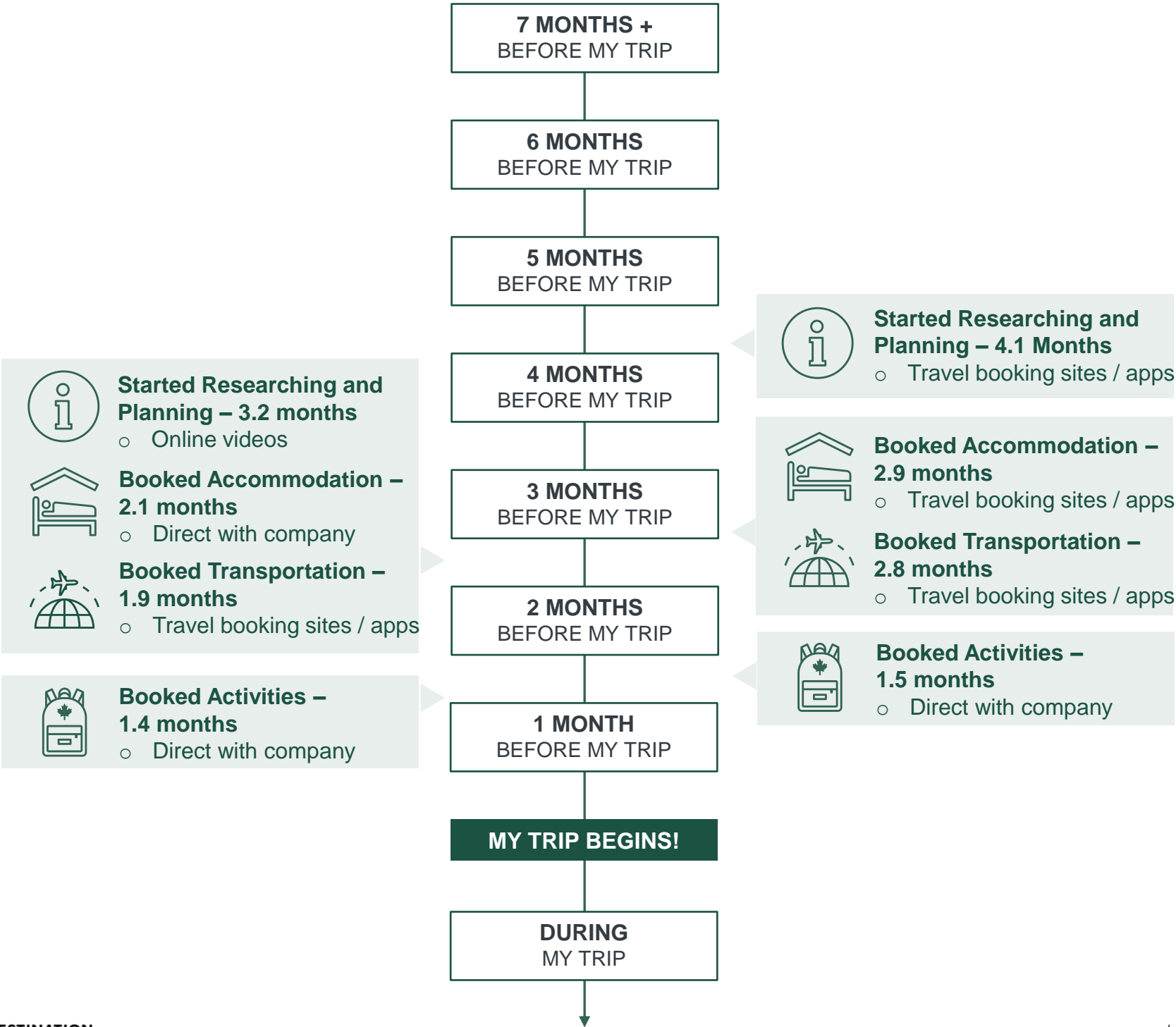
120

INDEX SCORE

- KEY** terminology on this page (for additional details and definitions see [Glossary](#))
- **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
0–3 HOURS / NO FLIGHT

FLIGHT OF  
3–7 HOURS






# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

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

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

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



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



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



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



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



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

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



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Canada	32%	103	Italy	3%	85
US	24%	102	Germany	2%	117
Mexico	6%	87	Portugal	2%	113
France	4%	98	Cuba	2%	91
UK	3%	103	Dominican Republic	2%	84



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

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



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

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

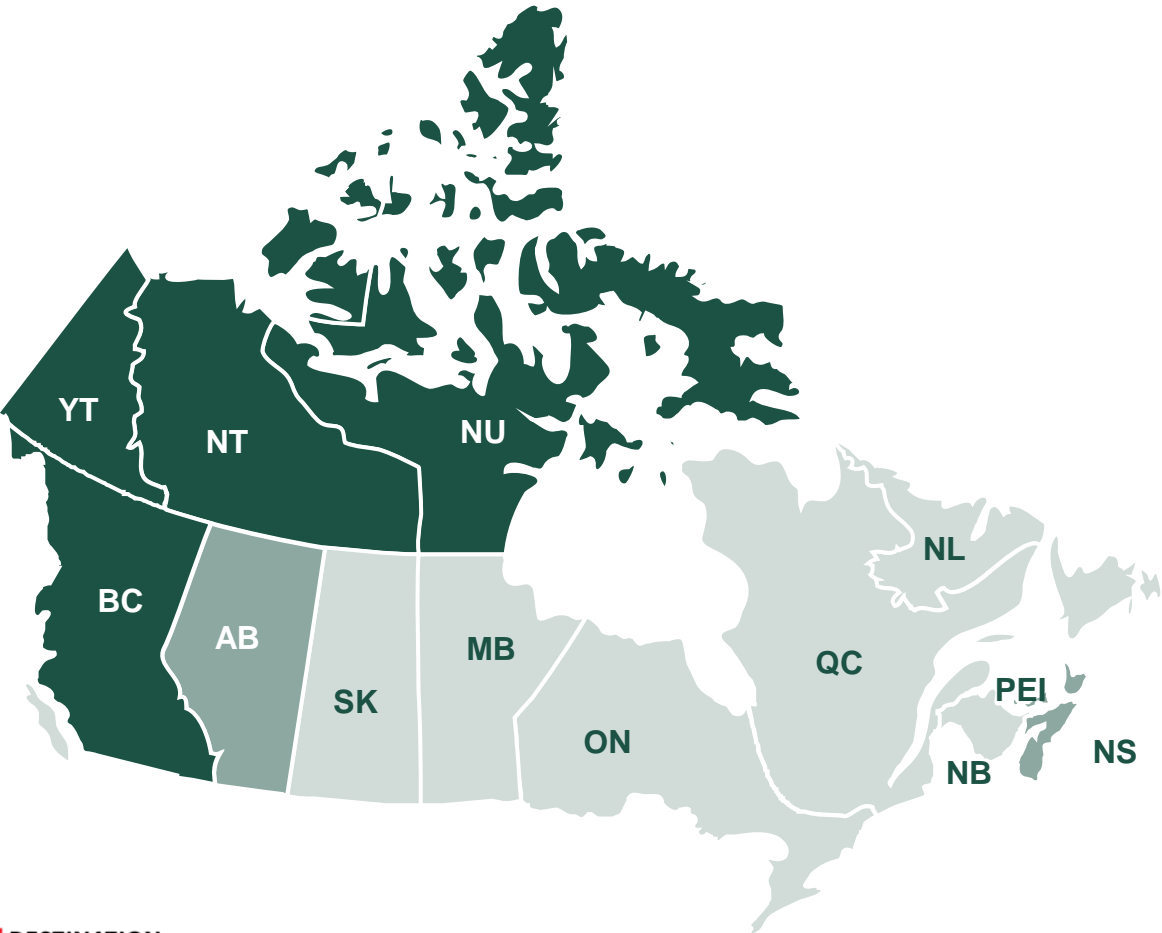


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



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





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

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



## CANADA TRAVEL MONTHS ON A PAST TRIP

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



## LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS

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



INDEX
114
122
108
63
77



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

- Among our youngest – we are building our lives and starting to make big moves. We have recently purchased a car, started a new job, or moved to a new city.
- Some of us are a little older, and we are just retiring, which may have also sparked a move to a new city or a home renovation.



### MAJOR LIFE EVENTS IN LAST 5 YEARS

4%

Had a child

94 INDEX SCORE

36%

Started a new job / career

133 INDEX SCORE

12%

Bought a new home

92 INDEX SCORE

19%

Moved to a new city

120 INDEX SCORE

3%

Child started school

94 INDEX SCORE

40%

Purchased a car

100 INDEX SCORE

11%

Retired

100 INDEX SCORE

26%

Renovated house

101 INDEX SCORE



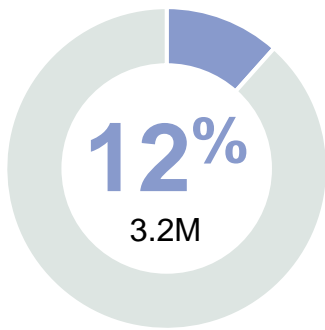
### NON-ESSENTIAL SPENDING PRIORITIES

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



# CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



## % OF CANADA POPULATION

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

### WHAT YOU NEED TO KNOW ABOUT ME

- 1

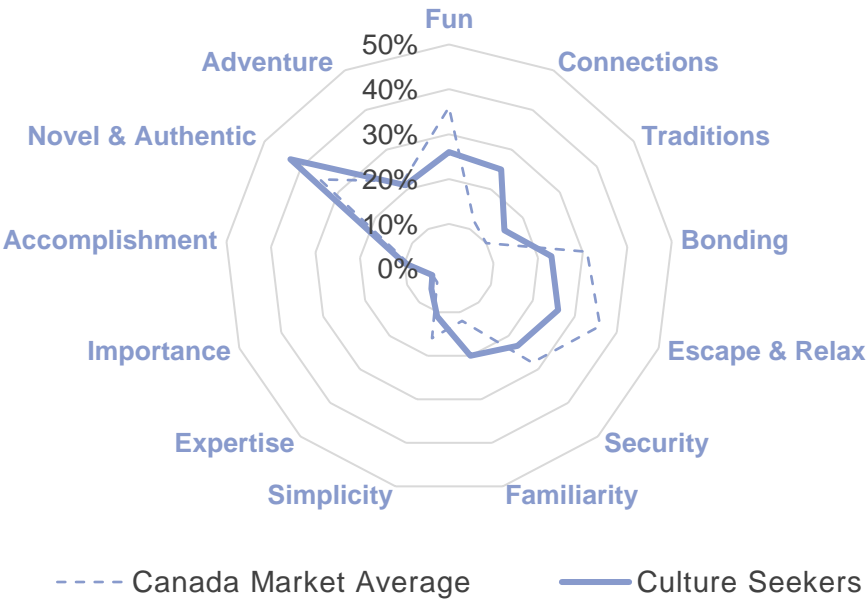
We prioritize diversity, inclusion and sustainability, and are open to both short and longer trips.
- 2

We like the challenge of a new experience, and aren't afraid of trying something different like unconventional accommodations.
- 3

We try to learn the basics of the language before we travel and learn something while we are there.
- 4

We take ownership over feeling welcomed in a destination by ensuring we travel responsibly and engage with communities.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

133

#### How is this calculated?

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



### TRAVELLER ECONOMIC INDEX

105

#### How is this calculated?

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



# CULTURE SEEKERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

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



## TRAVEL VALUES & ATTITUDES

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



## EMOTIONAL MOTIVATIONS

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



## DESIRED DESTINATION

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





# CULTURE SEEKERS

OUR DEMOGRAPHICS

AGE

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

EMPLOYMENT

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

IMMIGRATION STATUS

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

CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	44%	123
Quebec	21%	93
British Columbia	15%	113
Alberta	9%	77
Manitoba	3%	73

HH INCOME (CAD)

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

EDUCATION

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

**80%**  
118 Have a valid passport

GENDER

**57%**  
118 Male

**41%**  
79 Female

**1%**  
153 Non-binary / Other

HOUSEHOLD

**22%**  
97 Children <18 Living At Home\*

**8%**  
88 Children 18+ Living At Home\*

**18%**  
90 Children NOT Living At Home\*

**60%**  
110 No Children

\* Option is not exclusive



# CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

## TRAVEL TRADE INDEX: NON-GROUP

97

## TRAVEL TRADE INDEX: GROUP

105

**KEY** terminology on this page

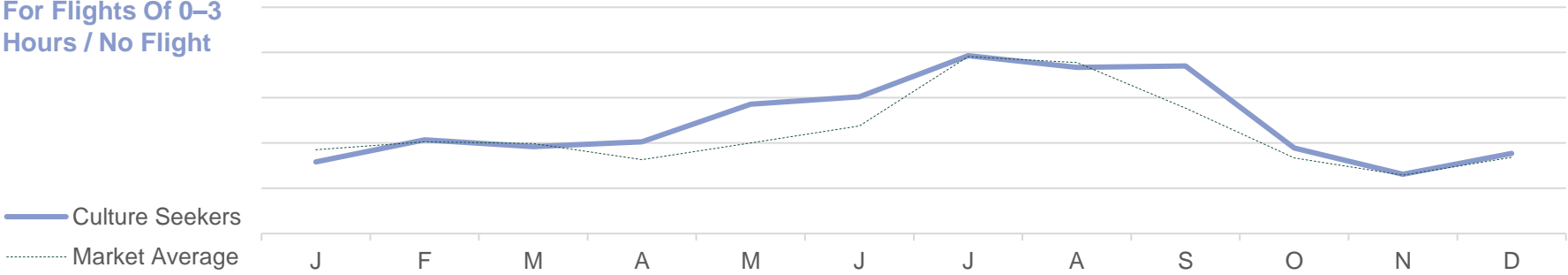
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- **TRAVEL TRADE INDEX – GROUP** – The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip.

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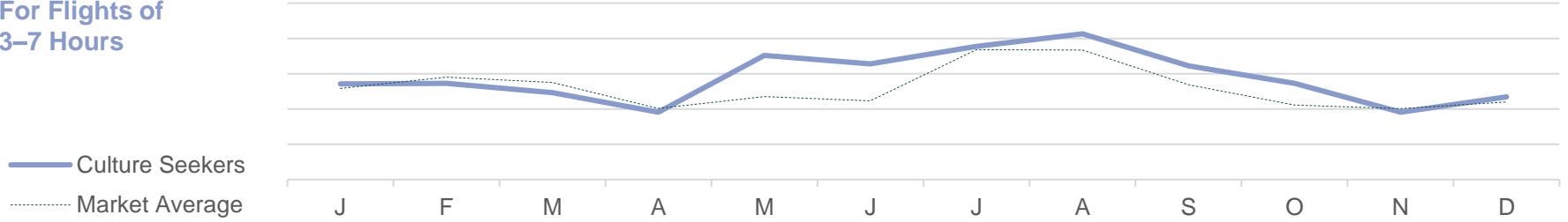


### TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



### TRIP DURATION

INDEX

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

Incidence is frequency of 2+ times per year



### TRIP TYPE

INDEX

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

Incidence is frequency of 2+ times per year



# CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

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



## THOUGHTS ON INDIGENOUS TRAVEL

63%

127 INDEX SCORE

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

12%

126 INDEX SCORE

Strong Interest In Indigenous Activities



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	85%	129
You only ever get to know a country by experiencing its culture	79%	120
I like to explore places that are off the beaten path and less explored	70%	125
I’m willing to put in the effort while travelling in order to see lesser-known places	65%	123
I’m open to travelling to destinations with limited tourist infrastructure	52%	125
I’m open to visiting destinations with challenging climates or weather conditions	38%	128



# CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

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



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	53%	81
Solo	23%	134
Adult relatives	18%	74
Friends	13%	97
Kids	12%	95



## BUDGET

### AVERAGE SPEND SHORT-HAUL

**\$2,740** 143 INDEX SCORE

### AVERAGE SPEND MID-HAUL

**\$2,700** 114 INDEX SCORE

### SPEND STYLE

Mid-range to Premium



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	70%	138
It's important to me that I visit somewhere that is open to diversity and inclusion	68%	136
I consider the impact that I personally have on the destinations I visit	66%	141
Hearing from underrepresented communities is an important part of travelling	60%	132
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	48%	135

48%

## PRIORITIZE SUSTAINABLE TRAVEL

128 INDEX SCORE

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

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





# CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES















## OVERALL INSIGHT

- We like exploring popular places and trendy but less-travelled experiences.
- When exploring cultural attractions, we actively engage and prioritize immersion.



### TOP DESIRED TRAVEL ACTIVITIES

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



# CULTURE SEEKERS

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	51%	74	54%	80
To learn through other cultures	44%	140	43%	125
To escape from routine	33%	69	35%	77
To spend time with family	33%	85	29%	89
For adventure and excitement	29%	100	38%	112
To check off dream travel places	25%	119	24%	105
To have fun with friends	23%	92	20%	94
To be pampered	14%	127	12%	97
For a romantic getaway	13%	116	7%	78



## EXTERNAL TRIP TRIGGERS

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

19% 99  
INDEX SCORE

Travel aligns with  
children’s school schedule

25% 106  
INDEX SCORE

Take time off for vacation  
during major holidays

14% 93  
INDEX SCORE

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



# CULTURE SEEKERS

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- We are generally planning within 4 months of a trip, and using many information resources.

67%

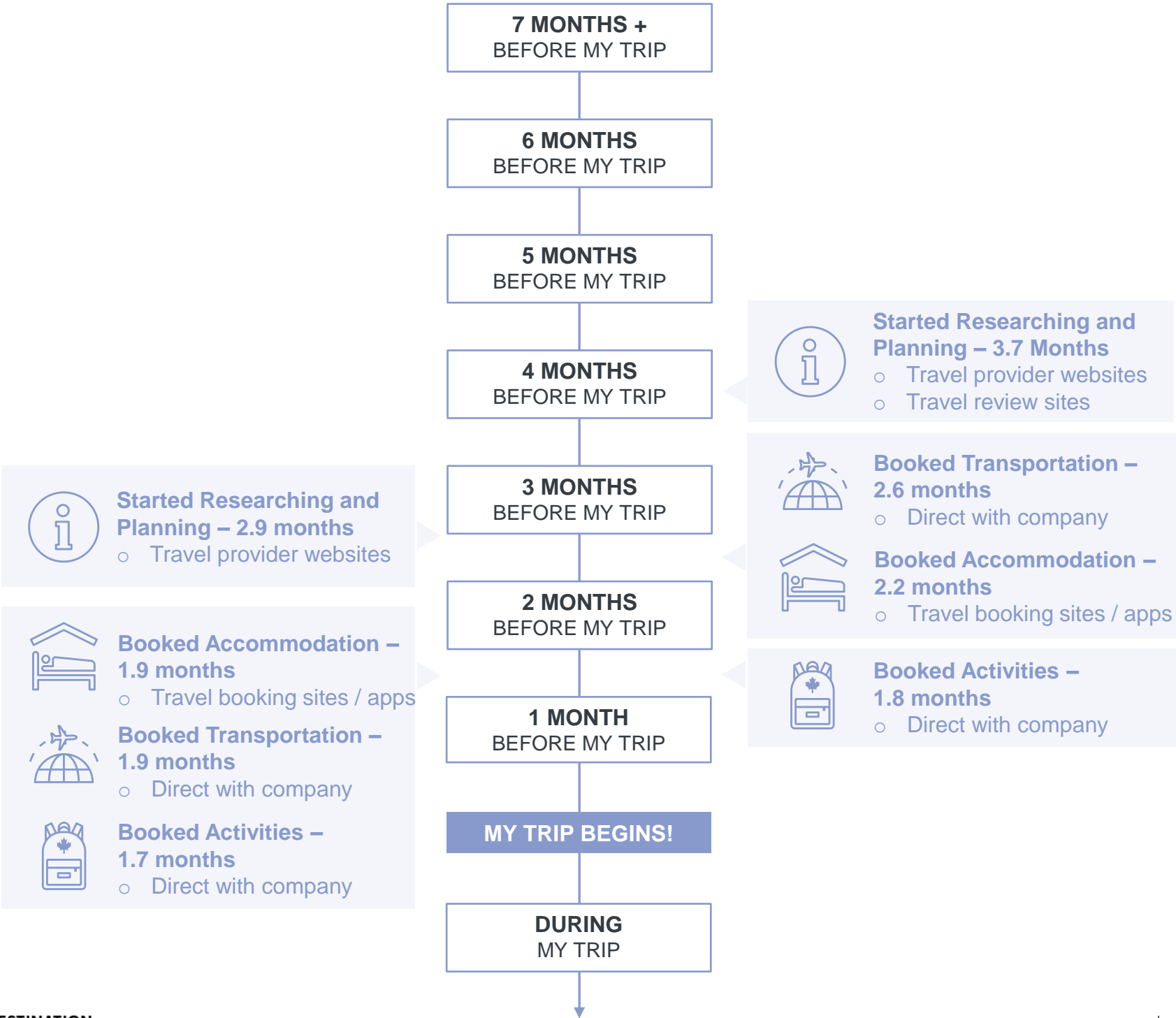
Primary Trip Planner

135  
INDEX SCORE

- !** KEY terminology on this page (for additional details and definitions see [Glossary](#))
- **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
0–3 HOURS / NO FLIGHT

FLIGHT OF  
3–7 HOURS






# CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips are about experiencing the culture, food, music, and shopping of a destination.
- We also take trips like Refined Globetrotters or City Trippers.

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

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



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



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



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



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



# CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

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



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Canada	26%	83	Mexico	5%	64
US	19%	73	Spain	4%	143
Italy	6%	135	Japan	3%	125
UK	5%	135	Dominican Republic	2%	86
France	5%	114	Portugal	2%	103



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

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





# CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

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

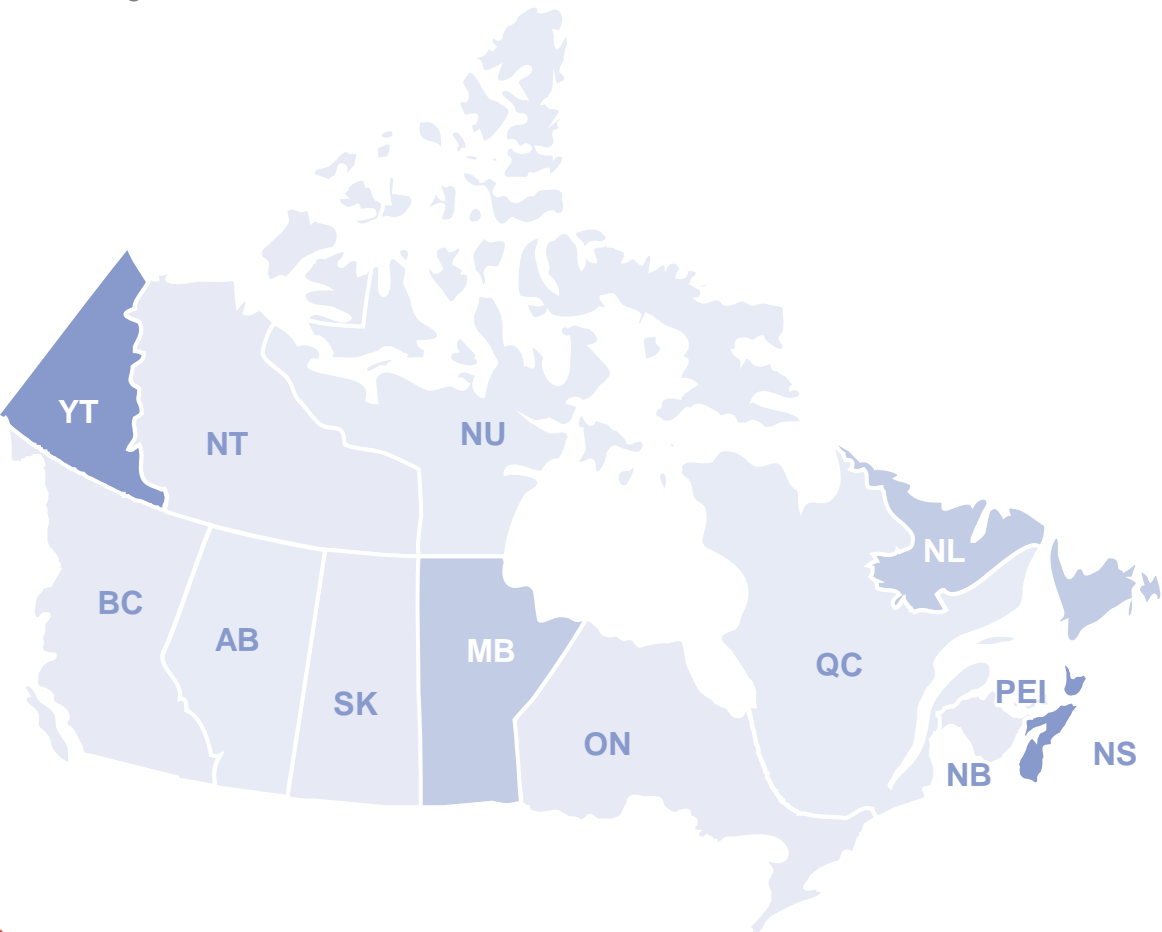


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



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



# CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

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



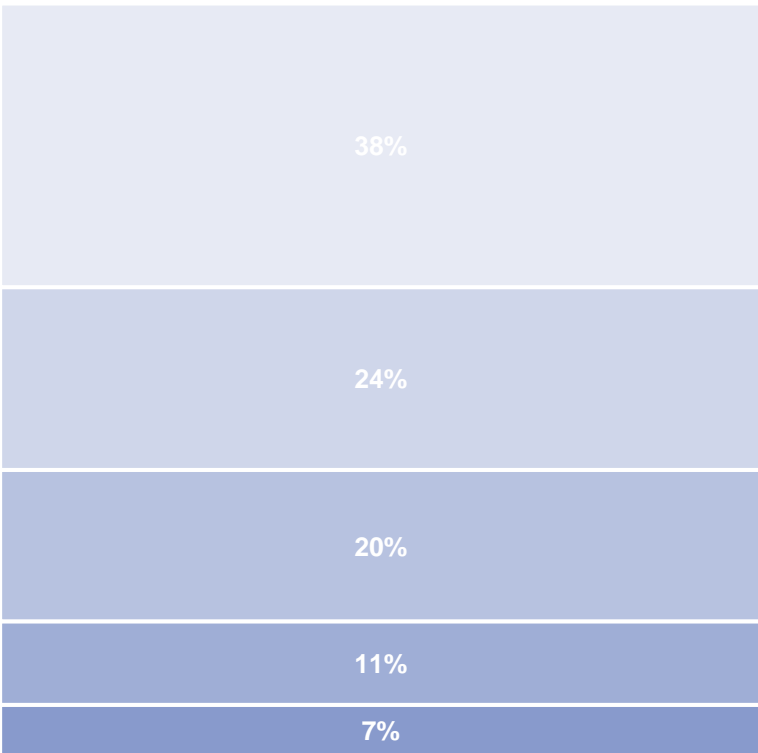
## CANADA TRAVEL MONTHS ON A PAST TRIP

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



## LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS

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



### INDEX

123
108
71
88
98



# CULTURE SEEKERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

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



### MAJOR LIFE EVENTS IN LAST 5 YEARS

4%

Had a child  
95 INDEX SCORE

32%

Started a new job / career  
116 INDEX SCORE

12%

Bought a new home  
94 INDEX SCORE

18%

Moved to a new city  
112 INDEX SCORE

4%

Child started school  
95 INDEX SCORE

35%

Purchased a car  
76 INDEX SCORE

10%

Retired  
96 INDEX SCORE

24%

Renovated house  
82 INDEX SCORE



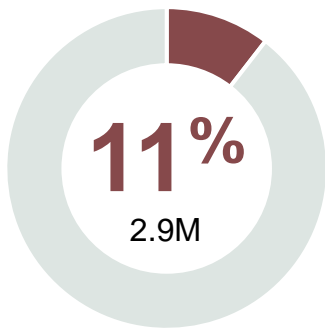
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	SCORE	INDEX
Travel	55%	92
Savings and investments	48%	84
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	45%	117
Experiences (e.g., concerts, events).	39%	128
Personal care and wellness	36%	84
Technology and gadgets	22%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



# REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



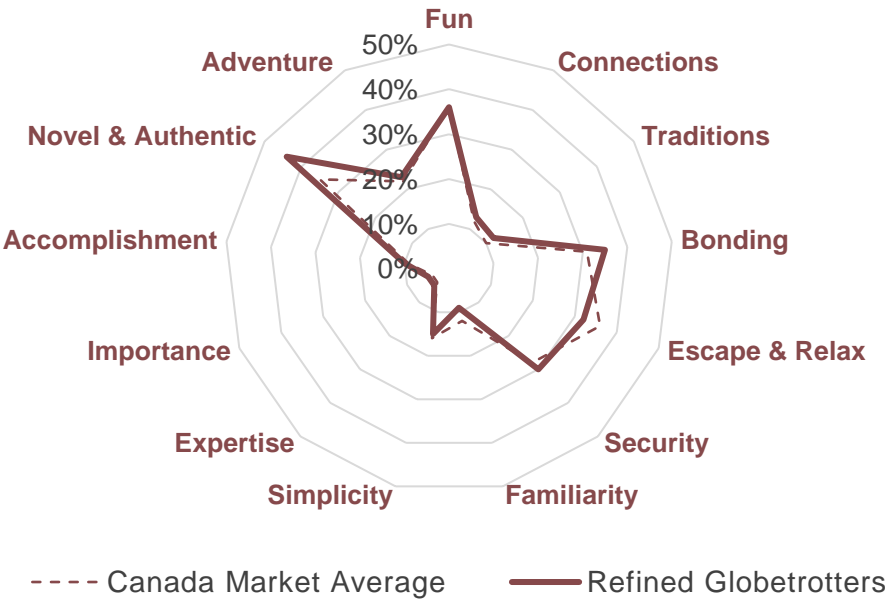
## % OF CANADA POPULATION

We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list. We immerse ourselves in history, museums, and the authentic charm of new places, ensuring smooth travel with all-inclusive packages and expert-guided tours.

### WHAT YOU NEED TO KNOW ABOUT ME

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

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

103

#### How is this calculated?

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



### TRAVELLER ECONOMIC INDEX

147

#### How is this calculated?

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



# REFINED GLOBETROTTERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

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



## TRAVEL VALUES & ATTITUDES

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



## EMOTIONAL MOTIVATIONS

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



## DESIRED DESTINATION

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





# REFINED GLOBETROTTERS

OUR DEMOGRAPHICS



## AGE

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



## EMPLOYMENT

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



## IMMIGRATION STATUS

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



## HH INCOME (CAD)

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



## EDUCATION

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



**87%**  
134 Have a valid passport



## GENDER

**53%** 103 Male

**48%** 98 Female

**0%** 86 Non-binary / Other



## HOUSEHOLD

**17%** 94 Children <18 Living At Home\*

**8%** 96 Children 18+ Living At Home\*

**32%** 115 Children NOT Living At Home\*

**51%** 101 No Children

\* Option is not exclusive



## CANADA PROVINCE BREAKOUT

	SCORE	INDEX
Ontario	45%	134
Quebec	24%	111
British Columbia	13%	68
Alberta	9%	72
Manitoba	4%	88

	SCORE	INDEX
Saskatchewan	2%	90
Nova Scotia	2%	98
New Brunswick	1%	79
Newfoundland and Labrador	1%	90
Prince Edward Island	0%	81



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

## TRAVEL TRADE INDEX: NON-GROUP

150

## TRAVEL TRADE INDEX: GROUP

145

**! KEY** terminology on this page

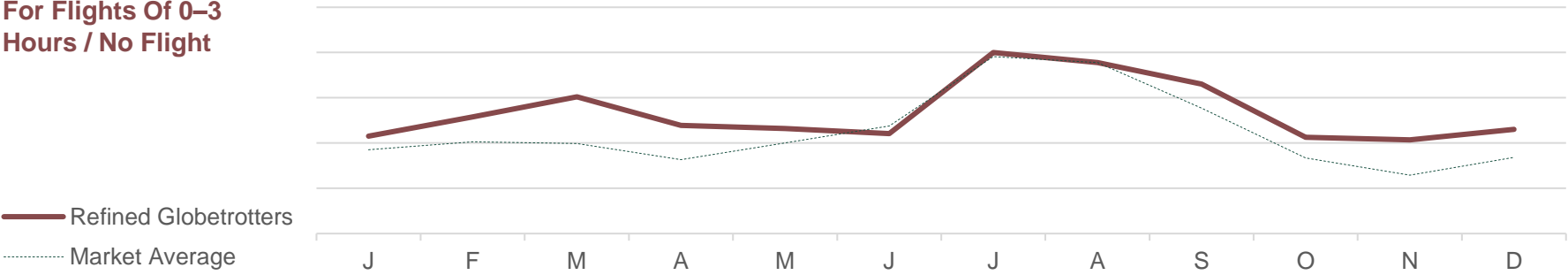
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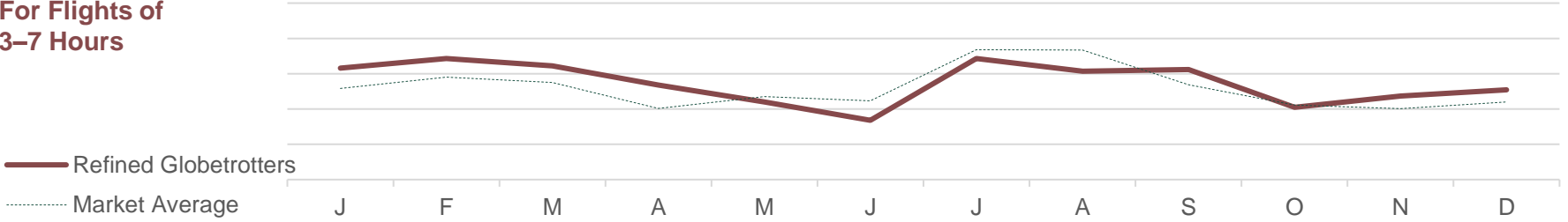


### TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



### TRIP DURATION

INDEX

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

Incidence is frequency of 2+ times per year



### TRIP TYPE

INDEX

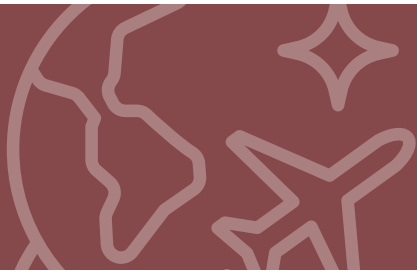
Domestic Leisure	37%	116
International Leisure	28%	147
Business Trip	9%	109
Added Personal To Business	7%	118
Worked During Vacation	5%	117

Incidence is frequency of 2+ times per year



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

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



## THOUGHTS ON INDIGENOUS TRAVEL

46%

101 INDEX SCORE

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

8%

102 INDEX SCORE

Strong Interest In Indigenous Activities



## WILLINGNESS TO LEARN AND EXPLORE

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





# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

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



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	74%	124
Adult relatives	17%	67
Friends	12%	91
Solo	11%	87
Kids	10%	93



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

\$4,890

139  
INDEX SCORE

### SPEND STYLE

Premium to High-end Luxury



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

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

35%

PRIORITIZE  
SUSTAINABLE  
TRAVEL

102 INDEX SCORE

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

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



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES















## OVERALL INSIGHT

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



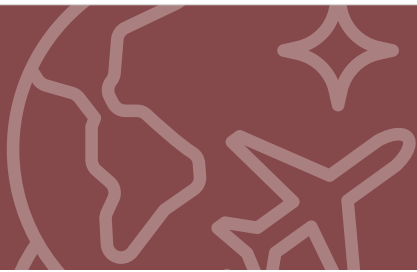
## TOP DESIRED TRAVEL ACTIVITIES

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



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	56%	85	66%	108
To escape from routine	39%	85	44%	99
To spend time with family	38%	92	32%	93
To learn through other cultures	32%	118	33%	107
To check off dream travel places	28%	132	34%	138
For adventure and excitement	23%	89	16%	78
To have fun with friends	20%	84	13%	75
For a romantic getaway	17%	150	19%	135
To be pampered	15%	134	18%	120



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	58%	121	55%	112
Visiting friends / family	32%	57	26%	79
Family / friends wanted to go	27%	81	21%	57
Special event (e.g., wedding, reunion)	20%	76	18%	79
Kids wanted to go	14%	97	12%	96
Festival or event	10%	72	10%	75

15% 94  
INDEX SCORE

Travel aligns with  
children’s school schedule

23% 101  
INDEX SCORE

Take time off for vacation  
during major holidays

13% 87  
INDEX SCORE

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





# REFINED GLOBETROTTERS

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

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

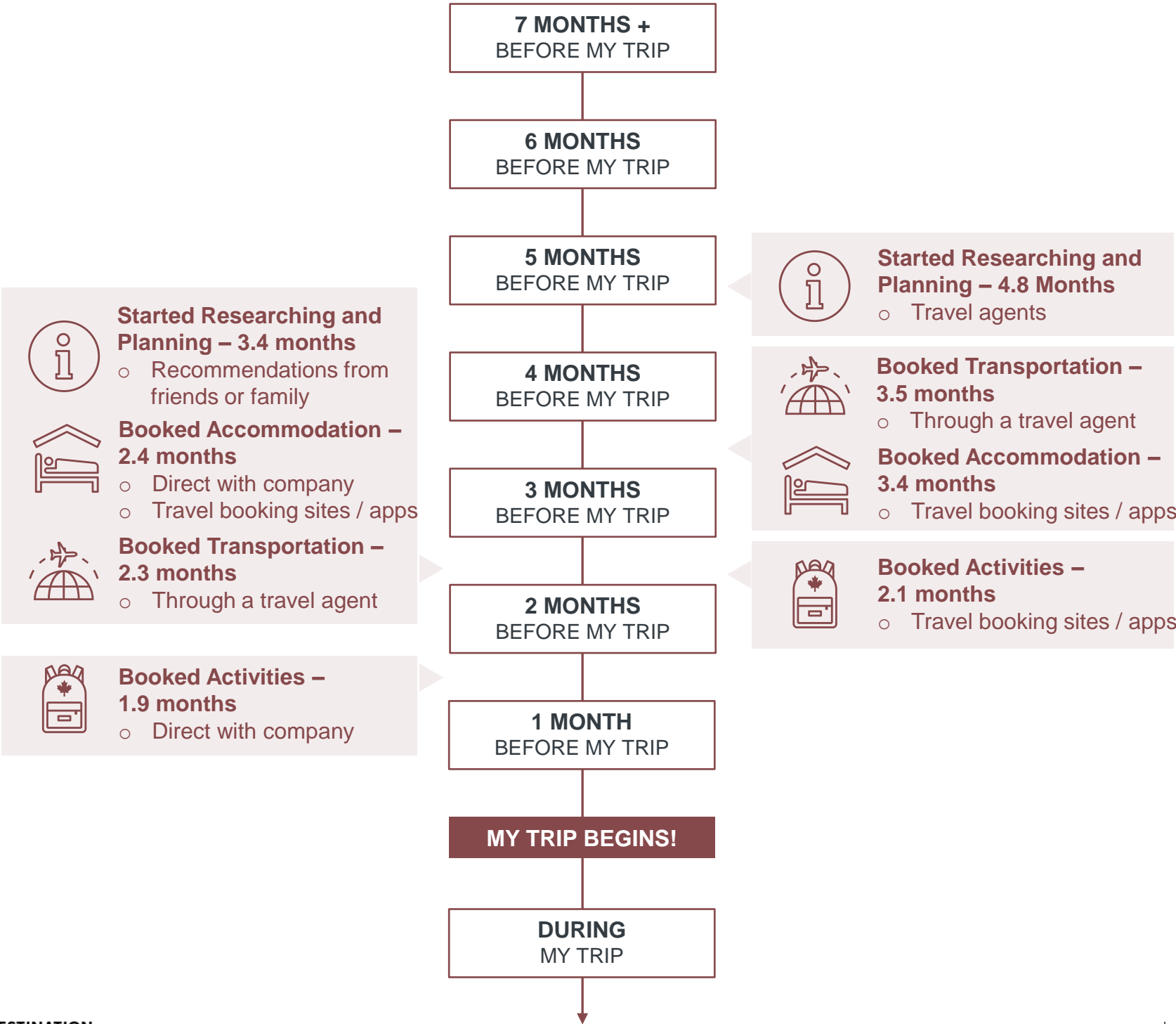
49%

Primary Trip Planner  
75  
INDEX SCORE

- ! **KEY** terminology on this page (for additional details and definitions see [Glossary](#))
  - **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
0–3 HOURS / NO FLIGHT

FLIGHT OF  
3–7 HOURS





# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

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

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

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



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



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



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



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



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

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



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Canada	20%	62	Dominican Republic	5%	146
US	20%	79	UK	4%	120
Mexico	8%	145	Portugal	3%	139
France	5%	124	Bahamas	3%	142
Italy	5%	123	Japan	3%	134



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

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



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

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



## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



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



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

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



## CANADA TRAVEL MONTHS ON A PAST TRIP

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



## LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS

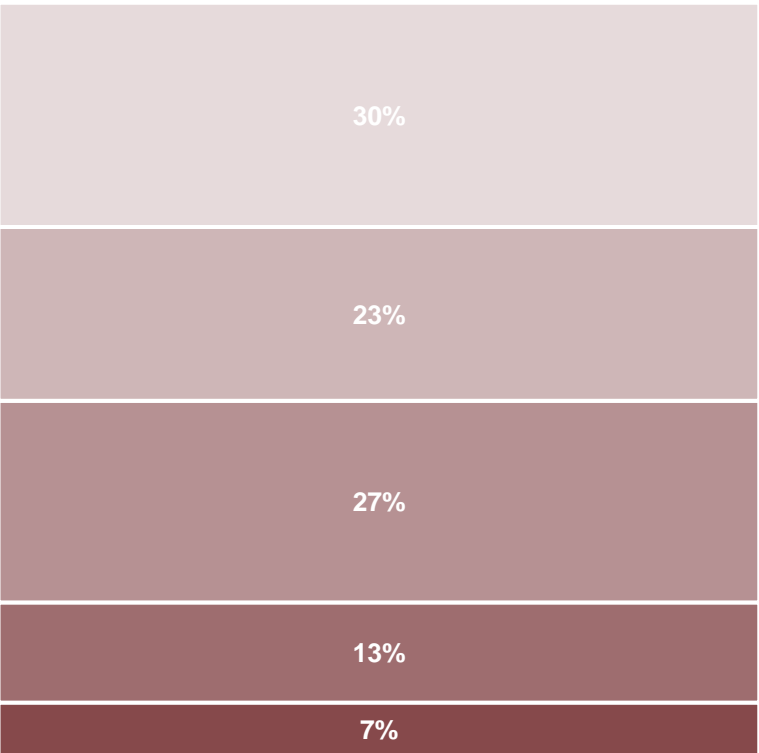
- Definitely

■ Very likely

■ Somewhat likely

■ Not very likely

■ Not considering Canada



INDEX
93
94
110
106
100



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

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



### MAJOR LIFE EVENTS IN LAST 5 YEARS

4%

Had a child

95 INDEX SCORE

24%

Started a new job / career

83 INDEX SCORE

12%

Bought a new home

91 INDEX SCORE

13%

Moved to a new city

77 INDEX SCORE

4%

Child started school

96 INDEX SCORE

44%

Purchased a car

121 INDEX SCORE

13%

Retired

110 INDEX SCORE

29%

Renovated house

134 INDEX SCORE



### NON-ESSENTIAL SPENDING PRIORITIES

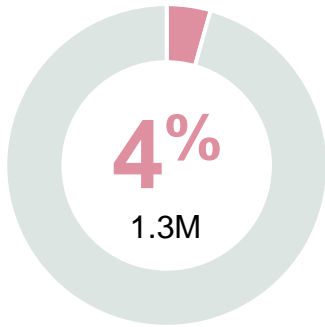
	SCORE	INDEX
Travel	75%	149
Savings and investments	52%	102
Personal care and wellness	38%	92
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	31%	52
Experiences (e.g., concerts, events).	30%	83
Fashion and accessories	21%	108





# PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



## % OF CANADA POPULATION

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

### WHAT YOU NEED TO KNOW ABOUT ME

- 1

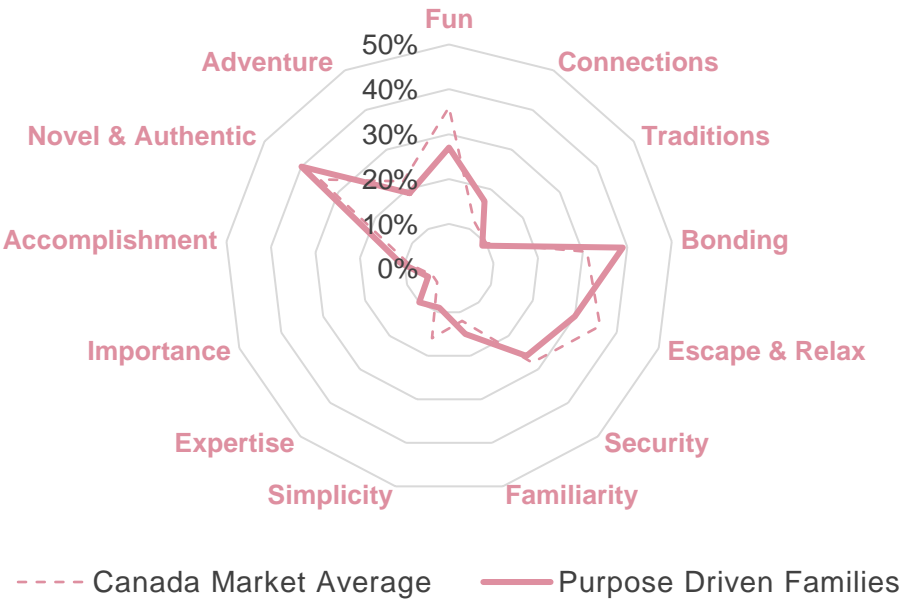
We take pride in our destination choices, and the effort it takes to reach some destinations.
- 2

Being trendy for us includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.
- 3

We value being able to provide these experiences to our children, but we also appreciate how it allows us to demonstrate our success to others.
- 4

Exposure to nature, exploring the outdoors, and immersing in culture are all primary needs.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

125

#### How is this calculated?

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



### TRAVELLER ECONOMIC INDEX

115

#### How is this calculated?

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



# PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

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



## TRAVEL VALUES & ATTITUDES

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



## EMOTIONAL MOTIVATIONS

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



## DESIRED DESTINATION

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



# PURPOSE DRIVEN FAMILIES

OUR DEMOGRAPHICS



## AGE

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



## EMPLOYMENT

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



## IMMIGRATION STATUS

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



## HH INCOME (CAD)

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



## EDUCATION

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



**73%**  
103 Have a valid passport



## GENDER

**62%** 133 Male

**38%** 69 Female

**0%** 86 Non-binary / Other



## HOUSEHOLD

**86%** 143 Children <18 Living At Home\*

**3%** 47 Children 18+ Living At Home\*

**1%** 60 Children NOT Living At Home\*

**13%** 61 No Children

\* Option is not exclusive



## CANADA PROVINCE BREAKOUT

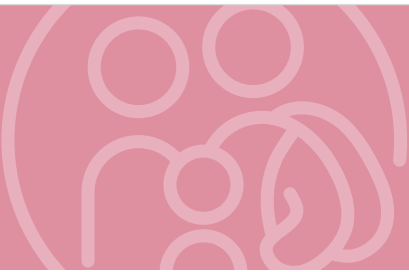
	SCORE	INDEX
Ontario	41%	105
Quebec	25%	119
Alberta	13%	121
British Columbia	13%	67
Saskatchewan	4%	112

	SCORE	INDEX
Manitoba	3%	67
Newfoundland and Labrador	1%	103
Prince Edward Island	1%	134
New Brunswick	0%	58
Nova Scotia	0%	52



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS



## TRAVEL TRADE INDEX: NON-GROUP

97

## TRAVEL TRADE INDEX: GROUP

102

**KEY** terminology on this page

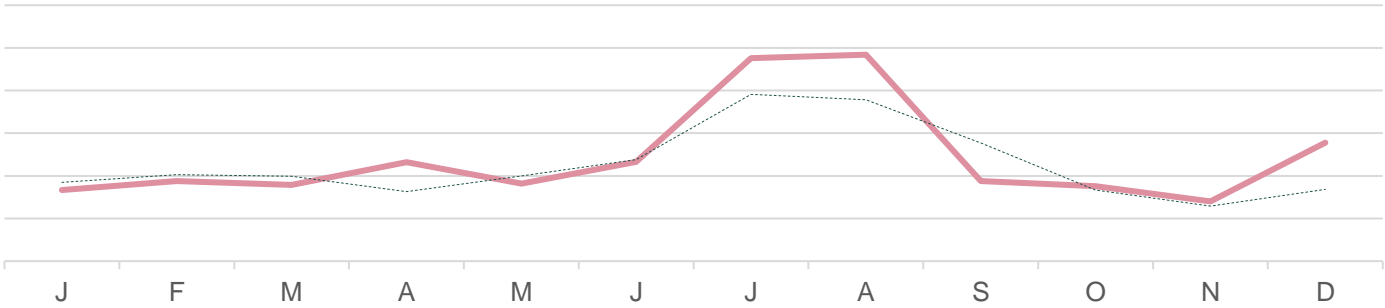
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).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

For additional definitions see [Glossary](#)

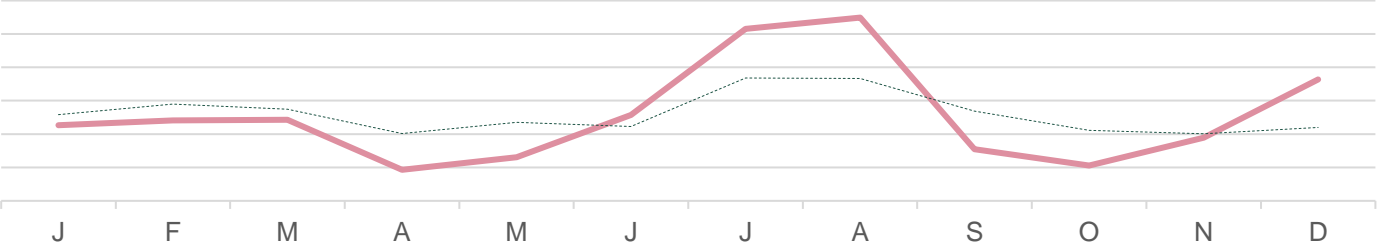


### TYPICAL TRAVEL MONTHS

For Flights Of 0–3 Hours / No Flight



For Flights of 3–7 Hours



### TRIP DURATION

INDEX

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

Incidence is frequency of 2+ times per year



### TRIP TYPE

INDEX

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

Incidence is frequency of 2+ times per year



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

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



## THOUGHTS ON INDIGENOUS TRAVEL

63%

128 INDEX SCORE

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

11%

120 INDEX SCORE

Strong Interest In Indigenous Activities



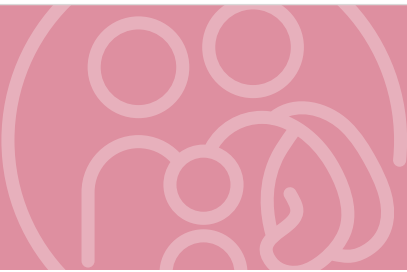
## WILLINGNESS TO LEARN AND EXPLORE

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



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

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



## TRAVEL COMPANIONS

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



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

\$4,440

126  
INDEX SCORE

### SPEND STYLE

Mid-range to Premium



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

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

49%

## PRIORITIZE SUSTAINABLE TRAVEL

130 INDEX SCORE

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

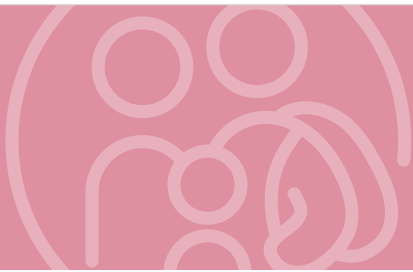
- **PRIORITIZE SUSTAINABLE TRAVEL** – The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as “travel that minimizes any negative impact on the destination’s environment, economy and society, while making positive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





# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES















## OVERALL INSIGHT

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



## TOP DESIRED TRAVEL ACTIVITIES

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



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 0–3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3–7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	66%	127	67%	139
To relax and unwind	57%	87	59%	91
To escape from routine	42%	92	38%	84
For adventure and excitement	34%	110	23%	88
To learn through other cultures	25%	105	41%	122
To have fun with friends	17%	71	14%	77
To check off dream travel places	15%	77	23%	99
For a romantic getaway	12%	103	4%	60
To seek solitude and isolation	8%	103	2%	76



## EXTERNAL TRIP TRIGGERS

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

54% 141  
INDEX SCORE

Travel aligns with  
children’s school schedule

46% 158  
INDEX SCORE

Take time off for vacation  
during major holidays

22% 151  
INDEX SCORE

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



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

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

60%

Primary Trip Planner

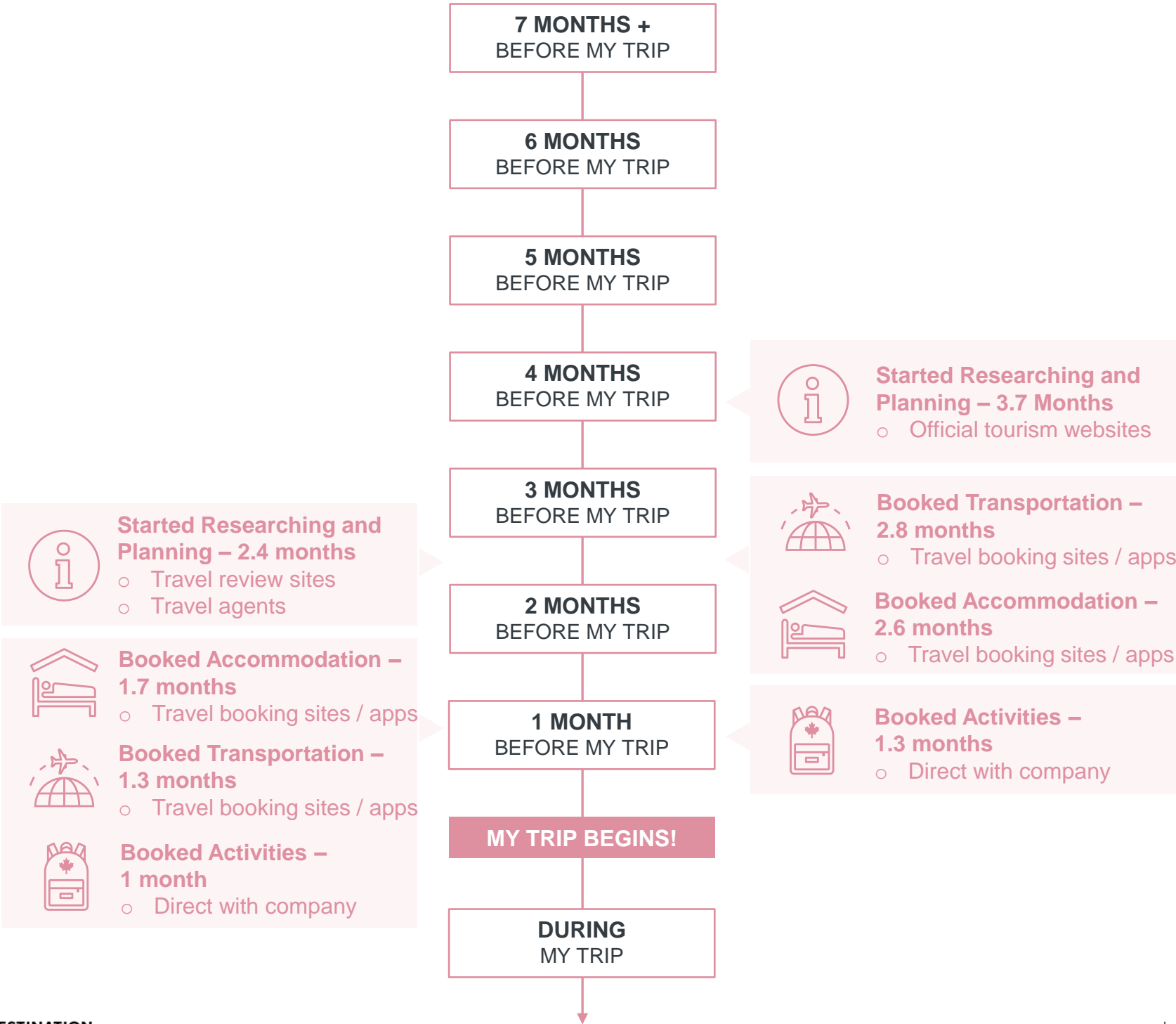
109 INDEX SCORE

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

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

FLIGHT OF  
0–3 HOURS / NO FLIGHT

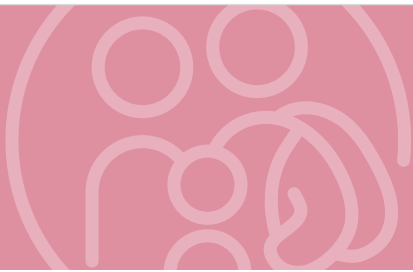
FLIGHT OF  
3–7 HOURS






# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

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

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

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



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



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



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

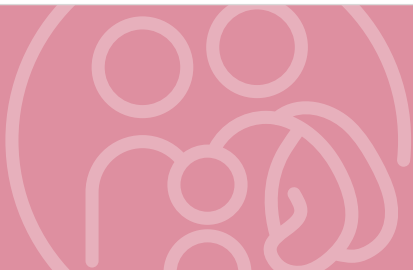


TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear Family With Kids		46%
	Extended Family		27%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Swimming		30%
	Oceanside beaches		26%
	Local restaurants		21%
KEY BEHAVIOURS	Planned in advance, spending more, visiting friends, and exploring a new culture		



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

- We are looking for kid-friendly access to nature and new cultural experiences.
- Most of our travel is in North America, but we venture further to Europe or Asian countries for the bigger trips.

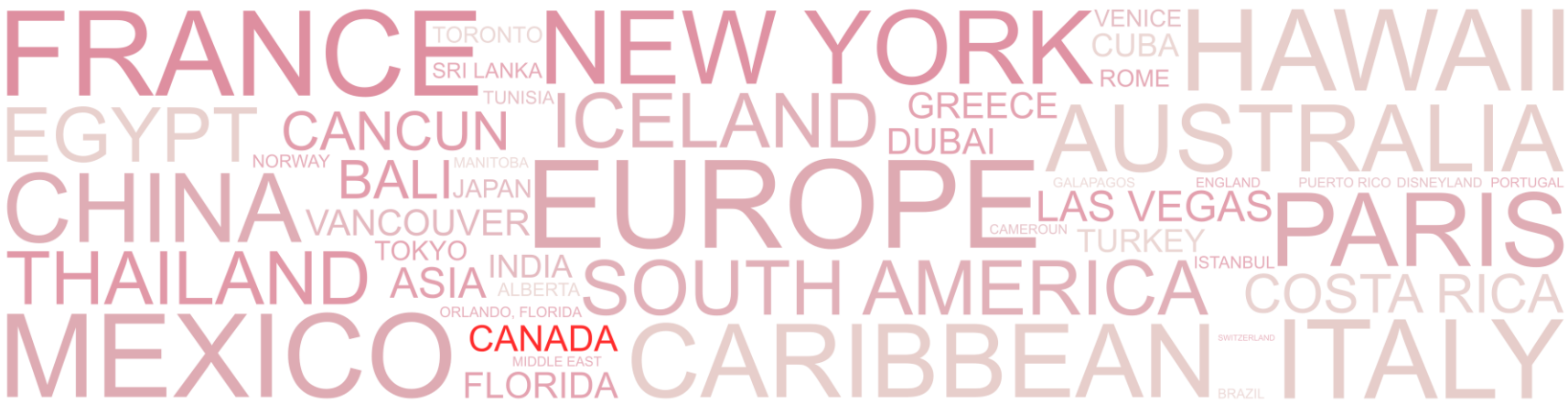


## WHERE WE ARE GOING LATELY

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



## WHERE DO WE WANT TO GO



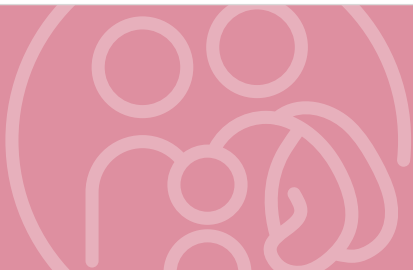
## DESIRED DESTINATION FUNCTIONAL BENEFITS

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



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

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

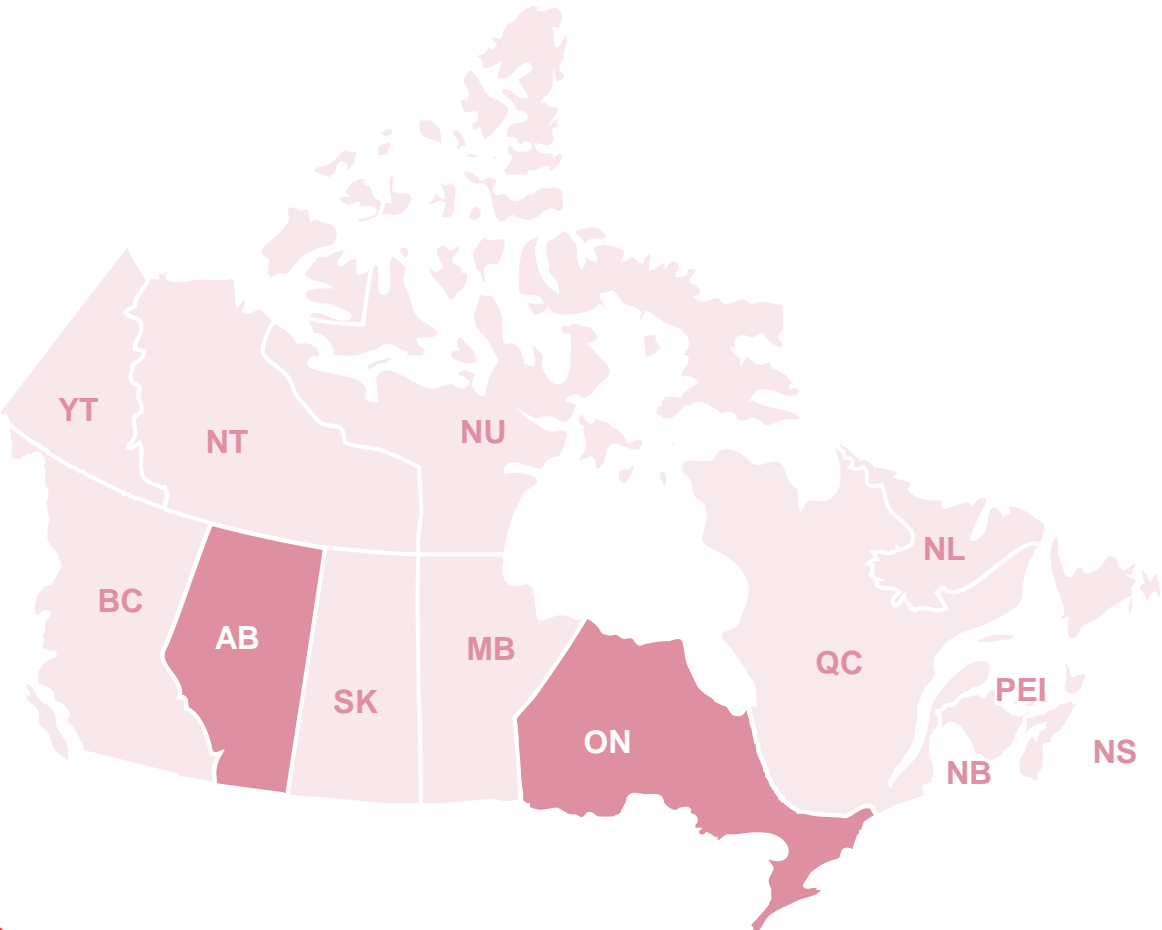


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



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





# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

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



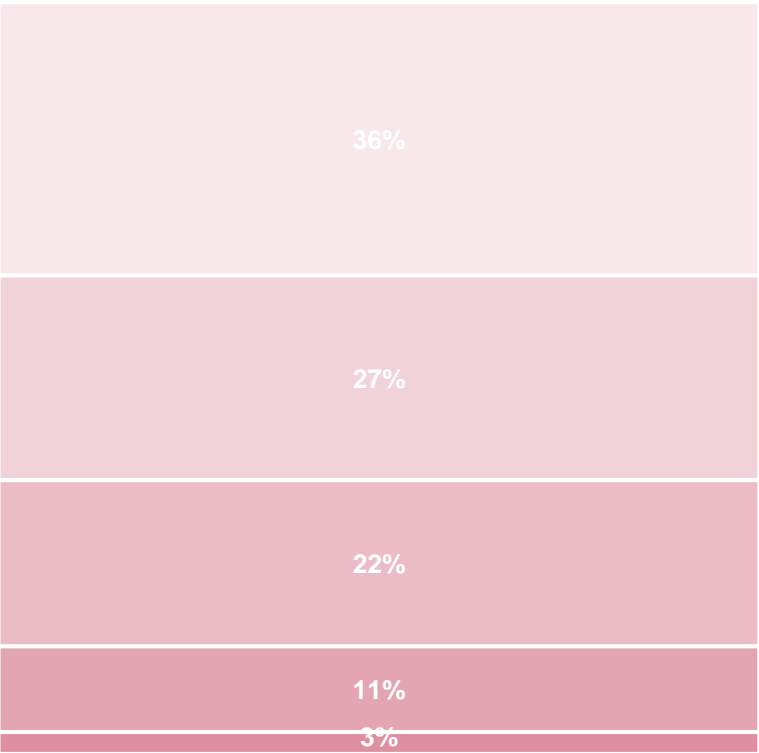
## CANADA TRAVEL MONTHS ON A PAST TRIP

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



## LIKELIHOOD TO TRAVEL OUTSIDE PROVINCE IN NEXT 2 YEARS

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



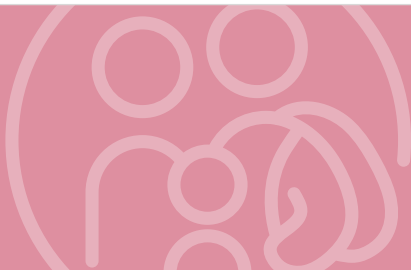
### INDEX

118
140
83
90
66



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

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



### MAJOR LIFE EVENTS IN LAST 5 YEARS

32%

Had a child

151 INDEX SCORE

31%

Started a new job / career

112 INDEX SCORE

26%

Bought a new home

151 INDEX SCORE

21%

Moved to a new city

133 INDEX SCORE

32%

Child started school

148 INDEX SCORE

44%

Purchased a car

122 INDEX SCORE

1%

Retired

56 INDEX SCORE

26%

Renovated house

103 INDEX SCORE



### NON-ESSENTIAL SPENDING PRIORITIES

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