

# AUSTRALIA MARKET PROFILES

Australian travellers, driven by their continent home's remoteness, embark on epic, extended journeys that allow them to explore the world's most authentic and unexplored destinations. Fuelled by a passion for adventure and the desire for novelty, they seek out experiences that blend fun with deep cultural immersion.

Australians are drawn to destinations that are both friendly and sociable, embracing the chance to discover hidden gems and create enduring memories on their longer holidays.



AUSTRALIA



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

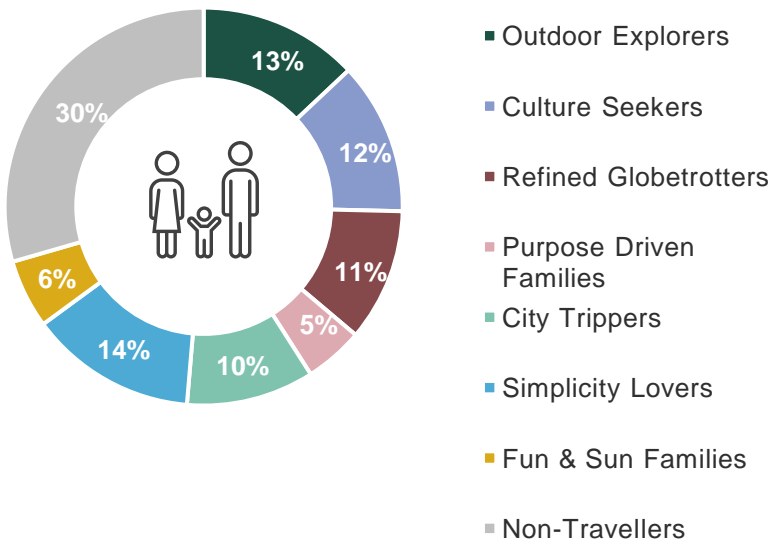
- One of the more nature and outdoor focussed markets, generally open to outdoor experiences and water sports (varying in intensity by segment), often seeking hidden gems.
- Overall inclined to value travel as an important way to access authentic experiences and be exposed to new perspectives.
- Friendly destinations which are safe and have adequate health standards are preferred.

Australians overindex for Fun & Sun Families, Culture Seekers, and Outdoor Explorers, often preferring activities such as overnight experiences, nature-based adventures, and water sports.

Australian travellers are particularly drawn to off-the-beaten-path destinations, where they can explore hidden gems while enjoying a relaxed atmosphere. Underindexing in non-travellers, Australians often prefer longer trips that allow them to fully immerse themselves in local culture and adventure.

# MARKET SIZING

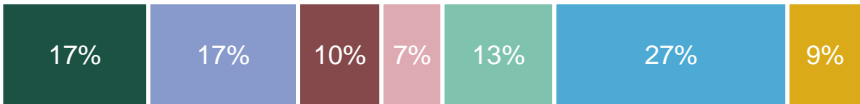
## POPULATION BREAKDOWN



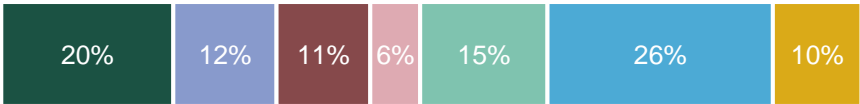
29.7% of the adult population in Australia (est. 20M) are non-travellers (est. 6M). Reasons for not travelling are often financial or health related.

## OUTBOUND TRAVELLERS' BREAKDOWN

### Short-haul Travellers



### Mid-haul Travellers



### Long-haul Travellers



### Travellers To Canada



**! 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	2.6M	Yes	<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	2.5M	No	<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	2.1M	Yes	<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	0.9M	No	<ul style="list-style-type: none"><li>○ Family-Focussed 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>○ Adventure</li></ul>
	CITY TRIPPERS	2.1M	No	<ul style="list-style-type: none"><li>○ Shopping</li><li>○ Nightlife</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	2.7M	No	<ul style="list-style-type: none"><li>○ Nature Experiences</li><li>○ Casual Sports</li><li>○ Cuisine</li></ul>	<ul style="list-style-type: none"><li>○ Escape &amp; Relax</li><li>○ Security</li><li>○ Simplicity</li></ul>
	FUN & SUN FAMILIES	1.1M	No	<ul style="list-style-type: none"><li>○ Family-Focussed Attractions</li><li>○ Shopping</li><li>○ Water Sports</li></ul>	<ul style="list-style-type: none"><li>○ Bonding</li><li>○ Escape &amp; Relax</li><li>○ Fun</li></ul>

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

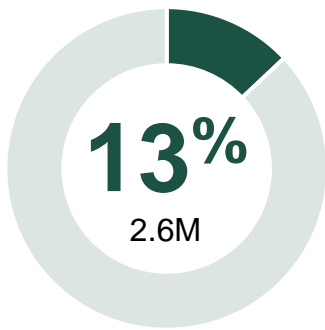
- **DESTINATION CANADA PRIORITY SEGMENT** – Traveller segments prioritized by Destination Canada for targeted marketing and strategic efforts due to the opportunity they provide to contribute significantly to the Canadian tourism landscape. Aligning with these segments enables tourism partners to effectively coordinate with the national tourism strategy and maximize 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 AUSTRALIA 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

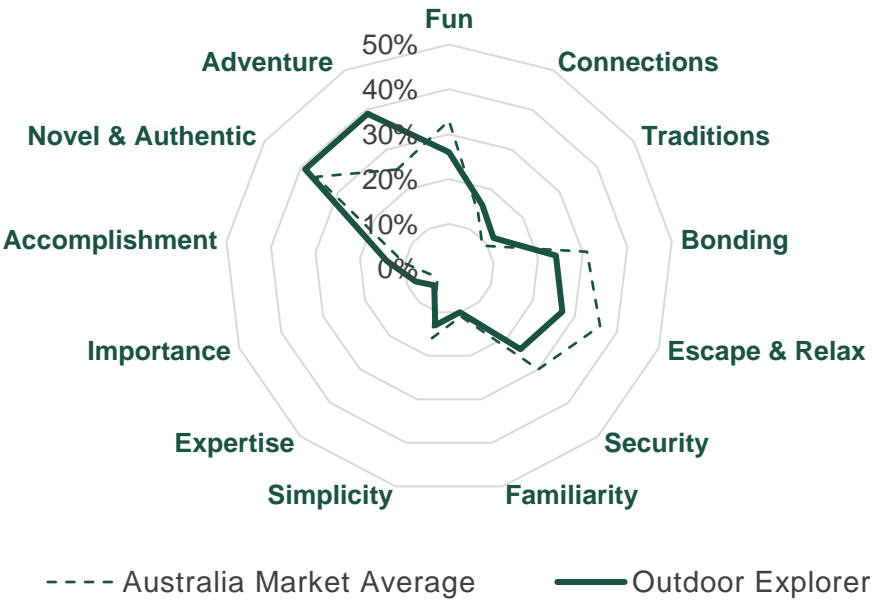
We love travel and take all types of trips (domestic / international / business / bleisure).
- 2

We're nature enthusiasts driven by a sense of accomplishment from overcoming challenges in the great outdoors.
- 3

Spontaneous yet savvy travellers, we rely on online resources and apps for trip planning and booking.
- 4

We consider our impact on the locales we visit, and as a result intentionally engage with the communities we explore.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

112

#### How is this calculated?

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



### TRAVELLER ECONOMIC INDEX

104

#### How is this calculated?

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



# OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

- 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 natural, adventurous, free-spirited, and unexplored destinations



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	80%	116
I'm always on the look out for new destinations to visit next	79%	123
I like my holiday to have some form of physical activity	79%	140
I like to come back from travels having learnt something new	74%	112
I generally think natural attractions are the highlights of my trip	72%	143
I'm passionate about travelling	70%	118
When I travel to natural environments, it makes me reflect on how fortunate I am	69%	122
I go where I want to go, no matter the hurdles	57%	133
I'm open to unconventional accommodations when travelling	54%	132
I enjoy living in the moment while travelling and don't worry much about what comes next	47%	116
I feel best on vacation when being highly active	47%	132
I like to keep my travel plans flexible and often book on short notice	42%	137
I'd be open to using AI-powered chatbots for travel planning and assistance	32%	131



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel a sense of adventure	50%	149
To be proud to share my travel experiences	29%	123
To push my limits and challenge myself	14%	139
To feel like I've accomplished something	14%	119
To create new, or take part in old, traditions	12%	117
To feel like I'm important	8%	129



## DESIRED DESTINATION

	SCORE	INDEX
Adventurous	54%	152
Fun	38%	103
Unique	31%	116
Free-Spirited	24%	143
Open	19%	107
Unexplored	19%	148





# OUTDOOR EXPLORERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We're under 35 years of age, and likely don't have kids yet.
- We're working full time, earning a moderate income. Some of us are also still finishing school.
- Find us in New South Wales and Queensland, or remote areas of Australia.



### AGE

	SCORE	INDEX
18-34	37%	123
35-54	33%	99
55+	29%	91
MEAN YEARS	44.3	87



### EMPLOYMENT

	SCORE	INDEX
Employed FT	48%	118
Employed PT	17%	99
Self-employed	4%	76
Retired	19%	93



### HH INCOME (CAD)

	SCORE	INDEX
\$35K or less	21%	100
>\$35K to \$105K	66%	101
More than \$105K	10%	106
Refused	3%	74



### EDUCATION

	SCORE	INDEX
Primary education or less	1%	136
Secondary education	20%	80
Post-secondary education	79%	117



**73%**  
103 Have a valid passport



### GENDER

**52%** 111 Male

**48%** 89 Female

**0%** 100 Non-binary / Other



### HOUSEHOLD

**31%** 99 Children <18 Living At Home\*

**9%** 84 Children 18+ Living At Home\*

**20%** 92 Children NOT Living At Home\*

**49%** 107 No Children

\* Option is not exclusive



### AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	35%	112
Victoria	24%	78
Queensland	24%	127
South Australia	7%	96

	SCORE	INDEX
Western Australia	7%	55
Tasmania	2%	97
Australian Capital Territory	2%	105





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

99

TRAVEL TRADE INDEX: **GROUP**

114

**! KEY** terminology on this page

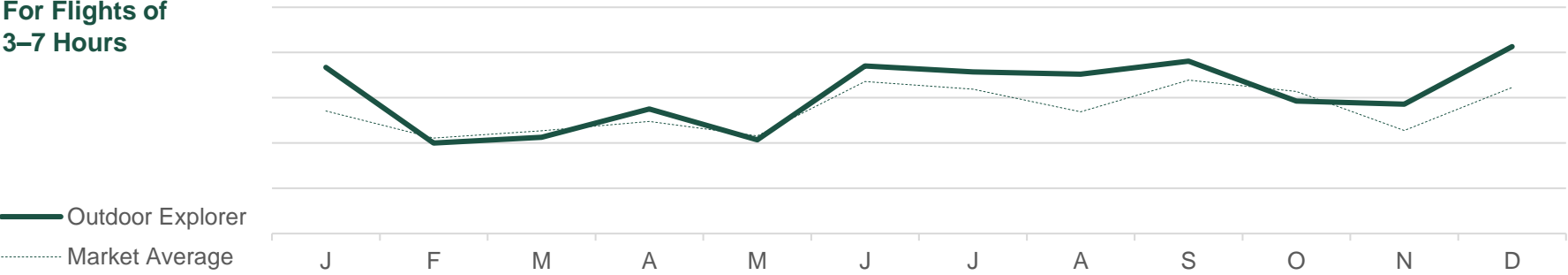
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).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

For additional definitions see [Glossary](#)

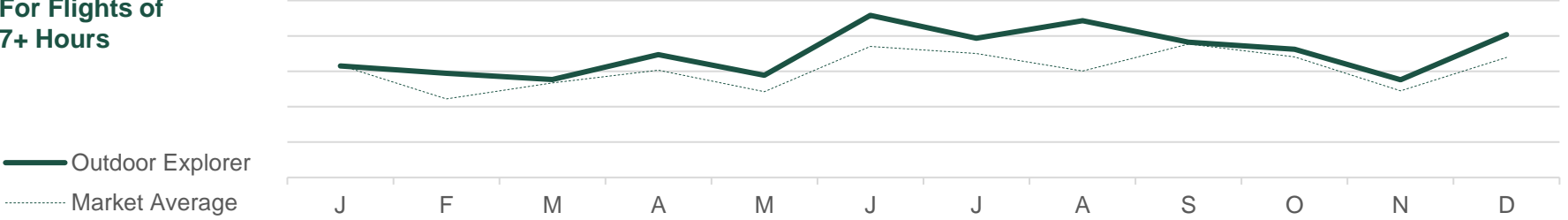


TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

INDEX

1-2 Days	41%	123
3-5 Days	30%	145
1 Week Holiday	18%	133
2 Weeks Holiday	11%	120
3 Weeks Or More	8%	124

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	41%	86
International Leisure	9%	107
Business Trip	12%	124
Added Personal To Business	5%	103
Worked During Vacation	7%	119

Incidence is frequency of 2+ times per year





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	43%	83
Vacation Rental (e.g., Airbnb, Vrbo)	23%	107
Friend's or family's place	23%	88
Campsite	19%	122
Budget Hotel	18%	140
Premium Hotel	13%	73



## THOUGHTS ON INDIGENOUS TRAVEL

56%

117 INDEX SCORE

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

12%

98 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	74%	132
I really want to learn about the history of the destinations I visit	69%	102
I'm willing to put in the effort while travelling in order to see lesser-known places	68%	127
You only ever get to know a country by experiencing its culture	68%	89
I'm open to travelling to destinations with limited tourist infrastructure	66%	137
I'm open to visiting destinations with challenging climates or weather conditions	48%	133



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

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



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	55%	86
Solo	21%	113
Adult relatives	18%	89
Kids	17%	96
Friends	12%	116



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

\$3,500

101  
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	60%	104
I consider the impact that I personally have on the destinations I visit	59%	113
It's important to me that I visit somewhere that is open to diversity	49%	102
Hearing from underrepresented communities is an important part of travelling	43%	112
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	39%	115

49%

## PRIORITIZE SUSTAINABLE TRAVEL

118 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.
- Guided tours that provide unique and novel access to nature are attractive.



### TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Nature experiences	76%	145
○ Nature walks	48%	149
○ Visiting nature parks or preserves	41%	143
○ Oceanside beaches	41%	142
 Water-based sports	22%	128
○ Swimming	14%	120
○ Kayaking, canoeing, or paddle-boarding	11%	127
 Casual sports	18%	141
○ Casual biking	7%	146
○ Fishing	6%	100
 High-intensity sports	12%	141
○ Bungee jumping or skydiving	4%	142
○ Whitewater rafting	3%	131
 Winter-based sports	12%	138
○ Snowboarding or downhill skiing	8%	142
○ Ice skating or hockey	4%	130
 Cultural experiences or attractions	43%	80
 Local cuisine	33%	65
 Guided tours	31%	107
 Overnight experiences	25%	103
 Family-focused attractions	23%	91
 Festivals and events	22%	86
 Shopping	22%	65



# 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	53%	76	52%	75
For adventure and excitement	42%	125	47%	134
To spend time with family	38%	95	33%	89
To escape from routine	33%	76	35%	88
To check off dream travel places	13%	88	27%	107
To have fun with friends	18%	93	12%	71
To learn through other cultures	33%	115	33%	101
For a romantic getaway	21%	129	10%	101
To have memories from top travel spots	13%	106	19%	126



## EXTERNAL TRIP TRIGGERS

	SCORE		SCORE	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	40%	84	41%	84
Visiting friends / family	35%	81	35%	78
Family / friends wanted to go	34%	108	32%	107
Special event (e.g., wedding, reunion)	22%	81	13%	57
Festival or event	21%	111	22%	106
Kids wanted to go	17%	100	16%	99

19% 96 INDEX SCORE

Travel aligns with children’s school schedule

29% 106 INDEX SCORE

Take time off for vacation during major holidays

19% 106 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

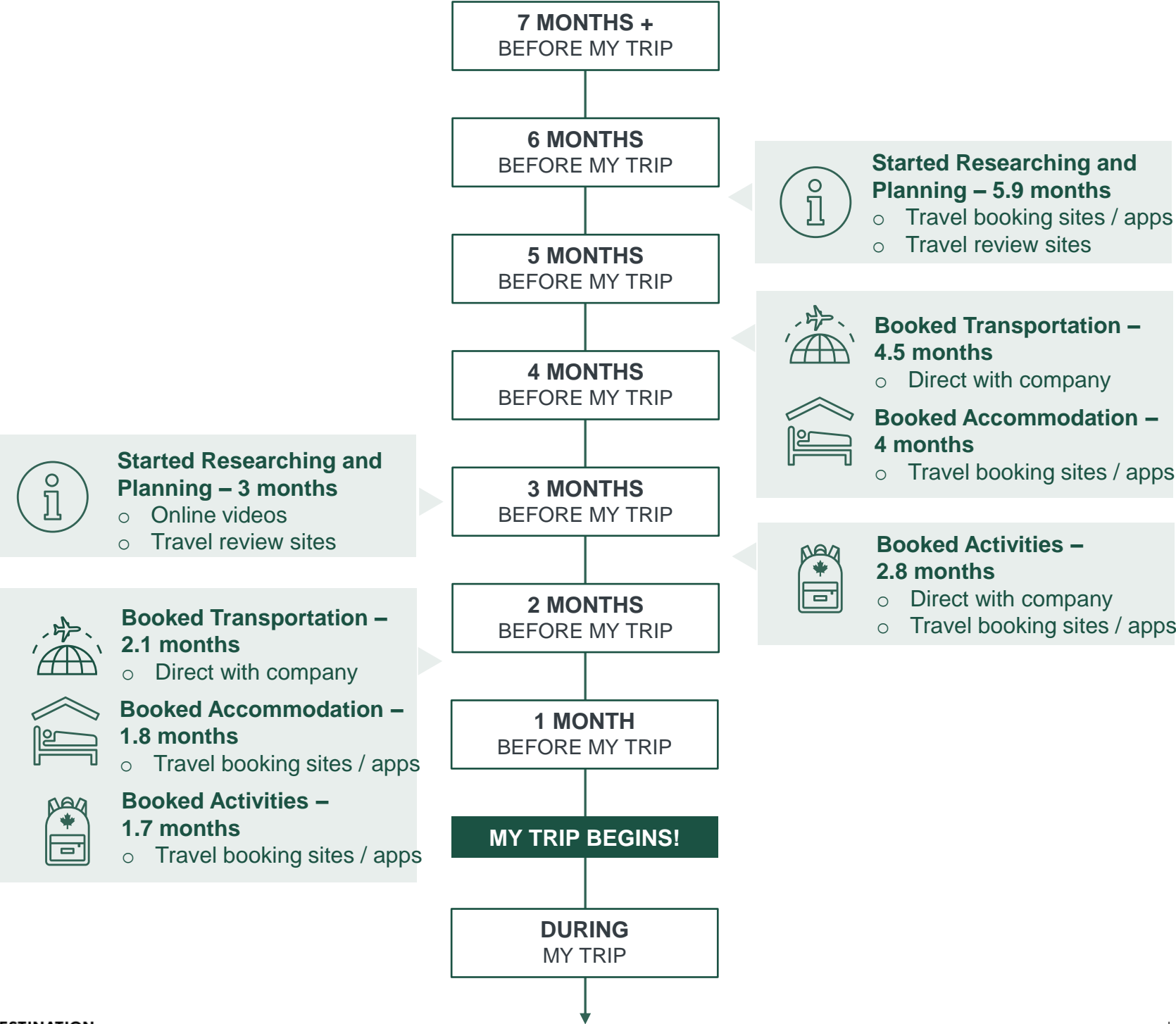
115

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






# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips are to adventure and nature 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.



TRIP TYPE	Adventure Destination		
COMPANIONS	Couple only		40%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Novel & Authentic	Adventure
ACTIVITIES	Nature walks		35%
	Oceanside beaches		31%
	Viewing wildlife in natural habitat		29%
KEY BEHAVIOURS	Seeking variety of access to adventure, may be a bucket list destination		



TRIP TYPE	Wildlife & Nature Reserve		
COMPANIONS	Couple only		29%
	Alone		25%
TRIP EMOTIONAL MOTIVATIONS	Adventure	Novel & Authentic	Bonding
ACTIVITIES	Nature walks		35%
	Visiting nature parks or preserves		32%
	Historical or archeological sites		20%
KEY BEHAVIOURS	Seeking novel and unique access to wildlife and landscapes, likely camping		



TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		27%
	Small cities and town		14%
TRIP EMOTIONAL MOTIVATIONS	Fun	Security	Novel & Authentic
ACTIVITIES	Cafes or bakeries		36%
	Local restaurants		36%
	Museums		28%
KEY BEHAVIOURS	Laid back trip to visit friends in a city, taking in local attractions		



TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		19%
	Small cities and town		19%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		40%
	Cafes or bakeries		31%
	Outdoor markets		18%
KEY BEHAVIOURS	Relaxing and reliable down-time with our partner, 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 frequent various Asian or Pacific destinations due to proximity, but also explore Europe and South America.



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Australia	52%	91	India	3%	135
New Zealand	6%	119	Italy	3%	106
Indonesia	4%	106	USA	3%	95
China	3%	141	France	3%	100
Japan	3%	88	UK	2%	78



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	48%	144
Provides opportunities to view wildlife in its natural habitat	44%	151
Provide access to unique natural wonders	41%	146
Provides numerous opportunities for outdoor adventures	32%	151
Offers a range of scenic viewpoints	32%	135
Offers natural landscapes in close proximity to city amenities	29%	136
Provides a remote, no-frills experience	15%	135
Offers options for adrenaline seekers	11%	149



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- We have likely been to Canada before, and more than once.
- We over-index for visiting nearly all provinces in Canada, with the greatest propensity for the East Coast and the Territories.
- Canada is on the list for future travel. We are thinking about camping and opportunities to see the Northern Lights.

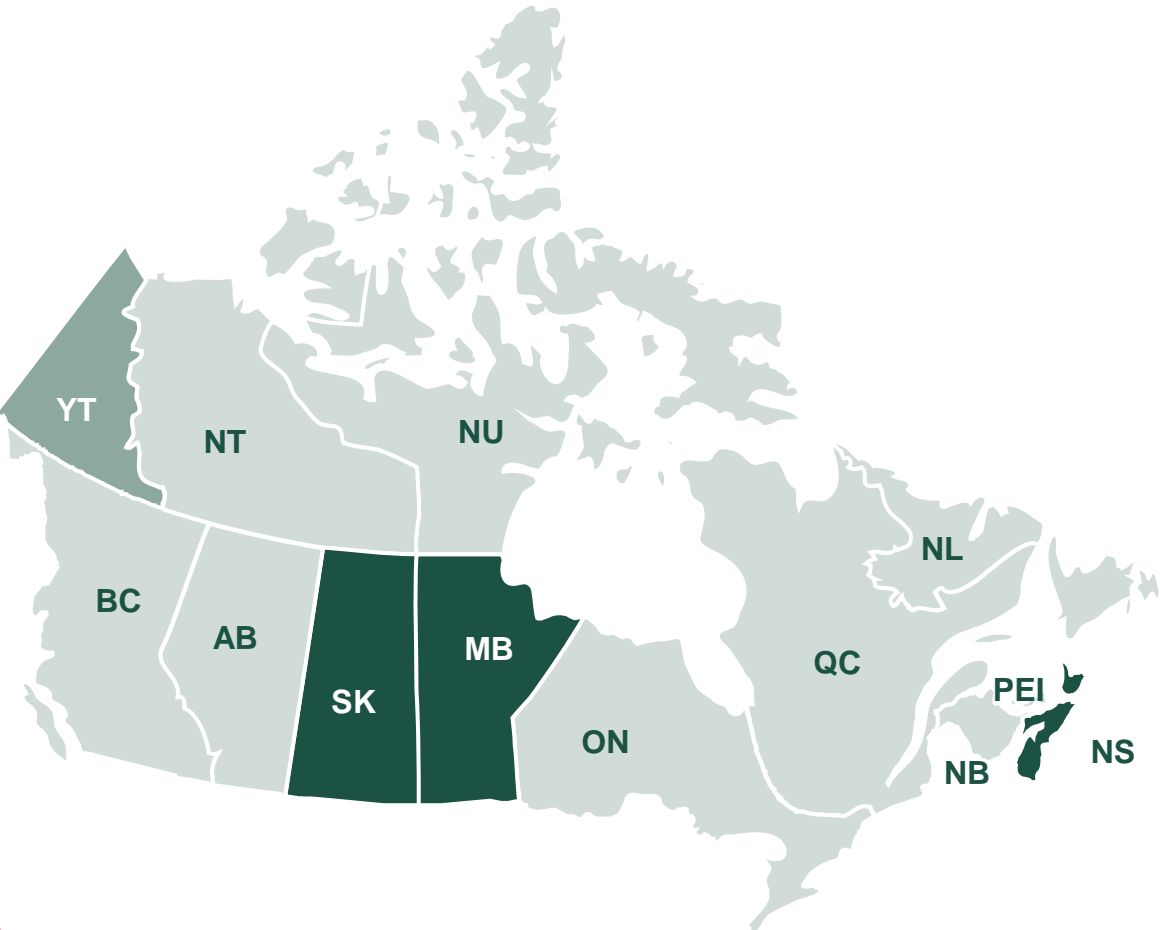


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	28%	90
BC	53%	102
MB	10%	133
NB	9%	108
NL	6%	104
NS	17%	134
NT	6%	115
NU	2%	110
ON	37%	97
PEI	6%	100
QC	30%	105
SK	10%	128
YT	9%	117





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- All seasons interest us.
- Those of us who haven't visited, are considering it in the future, and have already done some detailed research about Canada.



## CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	26%	30%	39%	27%
VS. TOTAL MARKET	22%	28%	42%	25%

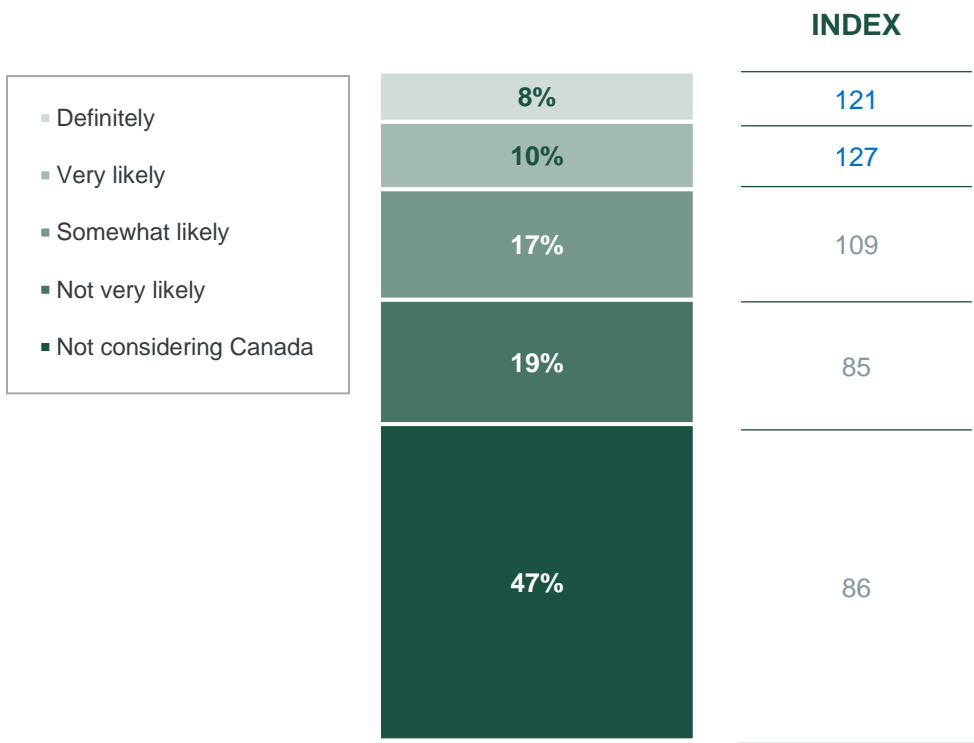
16%

Been to Canada in last 5 years

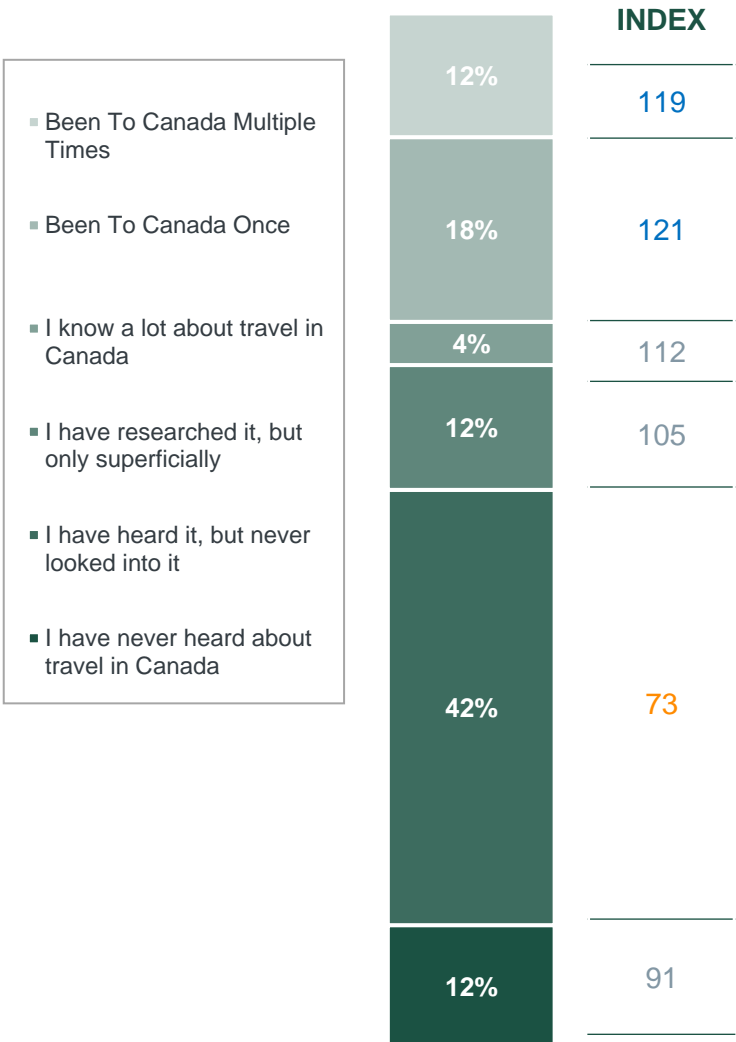
123 INDEX SCORE



## LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



## FAMILIARITY WITH CANADA





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

- Recent life changes have included a career move and / or moving to a new city.
- Beyond travel, our extra income is spent on our home and savings.



### MAJOR LIFE EVENTS IN LAST 5 YEARS

8%

Had a child

98 INDEX SCORE

34%

Started a new job / career

105 INDEX SCORE

16%

Bought a new home

91 INDEX SCORE

17%

Moved to a new city

117 INDEX SCORE

5%

Child started school

94 INDEX SCORE

40%

Purchased a car

109 INDEX SCORE

5%

Retired

89 INDEX SCORE

20%

Renovated house

108 INDEX SCORE



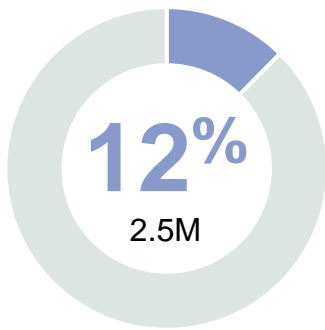
### NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	63%	102
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	52%	134
Savings and investments	48%	91
Personal care and wellness	34%	75
Experiences (e.g., concerts, events).	32%	101
Technology and gadgets	20%	110



# CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



## % OF AUSTRALIA POPULATION

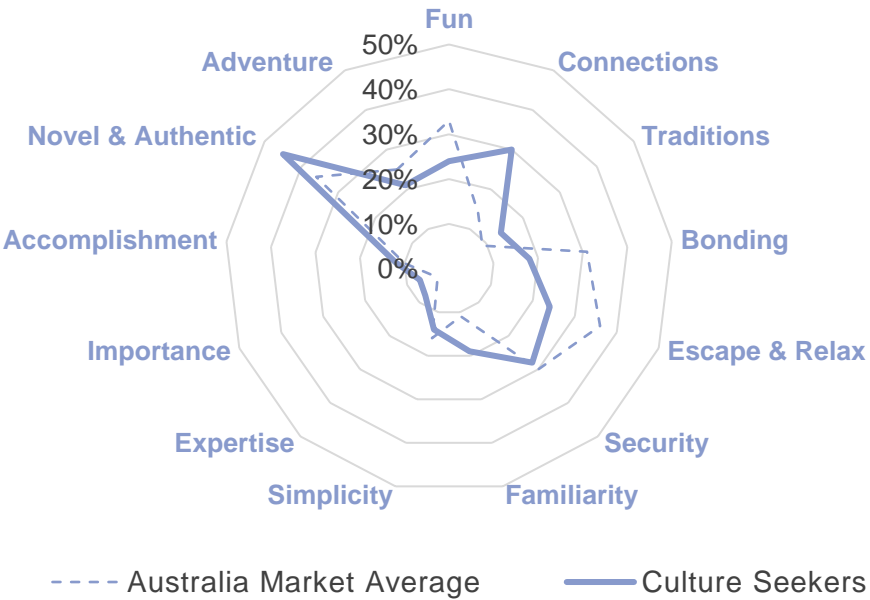
We are sociable, free-spirited individuals who seek unique, authentic experiences. We thrive on immersing ourselves in new perspectives, local culture, making connections, which boosts our energy and confidence.

We prefer vibrant city life, dynamic arts scenes, and culturally rich destinations. We prioritize diversity 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, sustainability and supporting the local economy.
- 2 We like the challenge of a new experience, and aren't afraid of trying something different like unconventional accommodations.
- 3 We try to learn the basics of the language before we travel and learn about the history of the destinations we visit.
- 4 We like exploring less-visited places, getting into nature, and value hearing from underrepresented communities.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

132

#### How is this calculated?

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



### TRAVELLER ECONOMIC INDEX

117

#### 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	80%	125
Trying out local cuisine is a really important part of travel	76%	123
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	73%	128
When I travel to natural environments it makes me reflect on how fortunate I am	69%	122
I am more likely to select destinations / activities that invest in socially responsible tourism	67%	122
I learn the basics of a language before visiting a country / region	61%	133
I like natural attractions but I don't usually think they are the highlights of my trip	58%	124
I go where I want to go, no matter the hurdles	52%	124
I'm open to unconventional accommodations when travelling	47%	120
I seek out destinations where I can explore my ancestral heritage	42%	129
I feel best on vacation when being highly active	40%	117
I like to keep my travel plans flexible and often book on short notice	37%	120
I'd be open to using AI-powered chatbots for travel planning and assistance	28%	117



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	48%	132
To open my mind to new perspectives	37%	122
To feel connected with new people	30%	144
To feel like a local	24%	142
To be familiar with my surroundings	15%	127
To create new, or take part in old, traditions	14%	123



## DESIRED DESTINATION

	SCORE	INDEX
Unique	32%	121
Accepting	32%	141
Charming	27%	131
Open	26%	137
Passionate	12%	114
Unexplored	10%	113





# CULTURE SEEKERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

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



### AGE

	SCORE	INDEX
18-34	35%	117
35-54	34%	100
55+	31%	93
MEAN YEARS	45.3	90



### HH INCOME (CAD)

	SCORE	INDEX
\$35K or less	21%	99
>\$35K to \$105K	67%	108
More than \$105K	9%	101
Refused	3%	79



### EMPLOYMENT

	SCORE	INDEX
Employed FT	48%	118
Employed PT	13%	83
Self-employed	8%	139
Retired	19%	94



### EDUCATION

	SCORE	INDEX
Primary education or less	0%	92
Secondary education	17%	70
Post-secondary education	82%	132



**80%**  
118 Have a valid passport



### GENDER

**58%** 129 Male

**42%** 71 Female

**1%** 114 Non-binary / Other



### HOUSEHOLD

**26%** 96 Children <18 Living At Home\*

**6%** 61 Children 18+ Living At Home\*

**20%** 92 Children NOT Living At Home\*

**54%** 112 No Children

\* Option is not exclusive



## AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	38%	136
Victoria	29%	117
Queensland	15%	77
Western Australia	10%	100

	SCORE	INDEX
South Australia	6%	87
Tasmania	1%	73
Australian Capital Territory	1%	82



# CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

## TRAVEL TRADE INDEX: NON-GROUP

121

## TRAVEL TRADE INDEX: GROUP

112

**KEY** terminology on this page

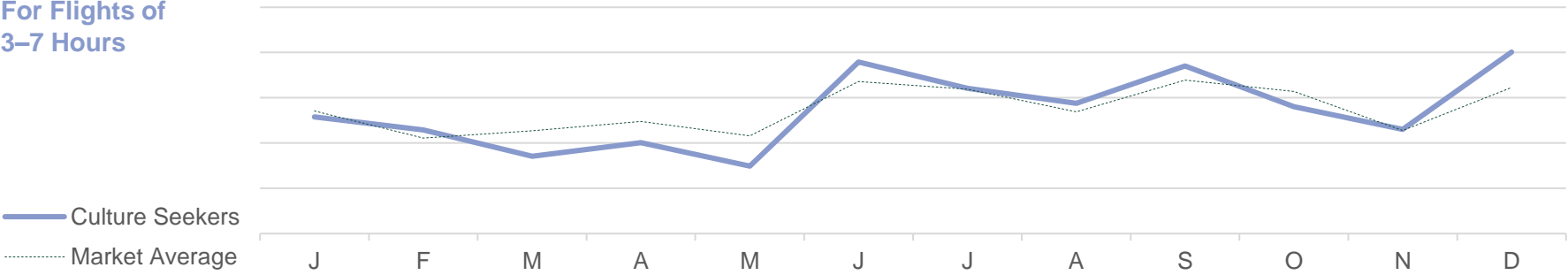
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **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](#)

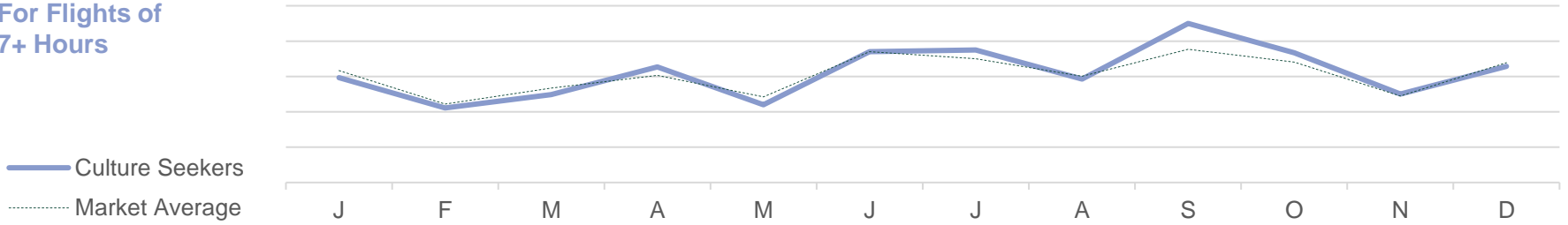


### TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



### TRIP DURATION

INDEX

1-2 Days	39%	111
3-5 Days	24%	108
1 Week Holiday	15%	116
2 Weeks Holiday	10%	111
3 Weeks Or More	8%	121

Incidence is frequency of 2+ times per year



### TRIP TYPE

INDEX

Domestic Leisure	42%	103
International Leisure	11%	116
Business Trip	13%	127
Added Personal To Business	10%	143
Worked During Vacation	8%	121

Incidence is frequency of 2+ times per year



# CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	47%	100
Friend's or family's place	29%	112
Vacation Rental (e.g., Airbnb, Vrbo)	26%	125
Premium Hotel	21%	102
Budget Hotel	13%	110
Bed & Breakfast	10%	140



## THOUGHTS ON INDIGENOUS TRAVEL

66%

132 INDEX SCORE

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

21%

138 INDEX SCORE

Strong Interest In Indigenous Activities



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	85%	133
You only ever get to know a country by experiencing its culture	81%	130
I like to explore places that are off the beaten path and less explored	68%	124
I'm willing to put in the effort while travelling in order to see lesser-known places	67%	124
I'm open to travelling to destinations with limited tourist infrastructure	53%	113
I'm open to visiting destinations with challenging climates or weather conditions	43%	123



# 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 some couples trips.



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	50%	75
Solo	27%	132
Adult relatives	16%	74
Kids	15%	95
Friends	8%	94



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

\$3,640

106  
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	74%	139
I consider the impact that I personally have on the destinations I visit	69%	130
It's important for me to know that the money I spend will support the local economy I'm visiting	68%	131
Hearing from underrepresented communities is an important part of travelling	57%	135
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	46%	128

56%

## 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.”





# CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES















## OVERALL INSIGHT

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



## TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Cultural experiences or attractions	66%	130
○ Museums	44%	128
○ Historical or archeological sites	38%	122
○ Visiting local monuments	38%	128
 Local cuisine	57%	116
○ Local restaurants	46%	112
○ Street cuisine	35%	123
 Festivals and events	44%	136
○ Music concerts or festivals	24%	124
○ Cultural or traditional festivals	23%	145
 Nightlife	22%	117
○ Bars and pubs	19%	121
○ Clubs and dancing	12%	119
 High-intensity sports	9%	121
○ Bungee jumping or skydiving	2%	111
○ Mountain biking	3%	119
 Nature experiences	43%	83
 Shopping	40%	99
 Guided tours	26%	95
 Overnight experiences	25%	107
 Family-focused attractions	19%	87
 Health and wellness	17%	112
 Casual sports	11%	88



# 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	54%	77	55%	86
To spend time with family	30%	86	36%	92
To escape from routine	42%	98	32%	77
To learn through other cultures	30%	110	43%	121
For adventure and excitement	33%	106	31%	102
To have fun with friends	20%	103	20%	118
To check off dream travel places	20%	114	26%	104
For personal reflection and growth	23%	134	20%	133
For a romantic getaway	10%	85	7%	84



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Visiting friends / family	37%	88	36%	86
Partner / spouse wanted to go	36%	77	40%	82
Family / friends wanted to go	31%	94	23%	86
Festival or event	23%	118	26%	118
Special event (e.g., wedding, reunion)	31%	118	30%	122
Kids wanted to go	13%	95	9%	92

21% 99 INDEX SCORE

Travel aligns with children’s school schedule

28% 103 INDEX SCORE

Take time off for vacation during major holidays

20% 112 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

76%

Primary Trip Planner

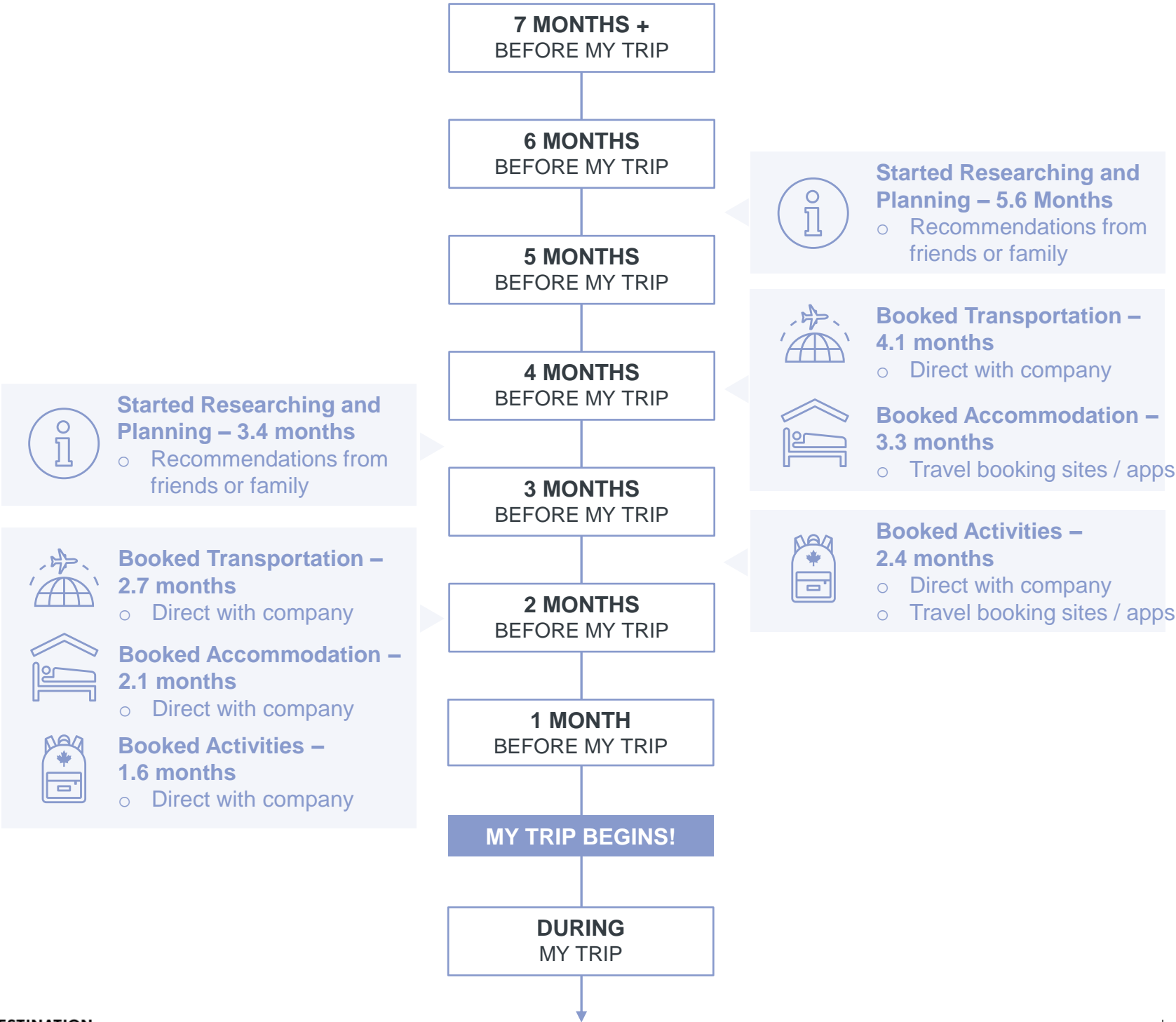
145  
INDEX SCORE

! **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






# 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 Refined Globetrotters.

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

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



TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		27%
	Small cities and town		14%
TRIP EMOTIONAL MOTIVATIONS	Fun	Security	Novel & Authentic
ACTIVITIES	Cafes or bakeries		36%
	Museums		28%
	Visiting famous shopping centres		16%
KEY BEHAVIOURS	Exploration of safe and trendy destinations, not planned too far in advance		



TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		33%
	Alone		27%
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Security
ACTIVITIES	Museums		54%
	Street cuisine		43%
	Outdoor markets		40%
KEY BEHAVIOURS	Authentic experience, immersed in a new culture. Planned well in advance		



TRIP TYPE	Urban Centre		
COMPANIONS	Alone		36%
	Couple only		28%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Security
ACTIVITIES	Local restaurants		44%
	Museums		30%
	Visiting famous shopping centres		29%
KEY BEHAVIOURS	Visiting friends, connecting, trying local restaurants and nightlife		



TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		13%
	Small cities and town		13%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Local restaurants		54%
	Cafes or bakeries		37%
	Visiting nature parks or preserves		20%
KEY BEHAVIOURS	May be all-inclusive or a cruise, booked more in advance with a higher budget		



# CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

- We seek rich culture and heritage, with a variety of museums and historical sites.
- Many of us travel within Australia. We also visit Japan, Indonesia, Singapore and New Zealand.



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Australia	44%	74	USA	4%	121
Japan	5%	128	Italy	4%	122
New Zealand	5%	97	UK	3%	107
France	4%	140	Singapore	3%	121
Indonesia	4%	118	Germany	3%	134



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	44%	128
Has a variety of museums and / or historical sites	37%	138
Is inclusive and tolerant	35%	149
Provides a variety of local festivals and events	27%	146
Has a thriving arts and music scene	24%	153
Offers an energetic and dynamic cultural scene	22%	150
Offers an eccentric and unique atmosphere	18%	139
Has vibrant nightlife and entertainment	17%	126





# CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- Many of us have never visited Canada. Those have visited have likely only been once.
- We have explored a range of provinces, favouring Ontario, British Columbia and Quebec, but also ventured into the Prairies, Atlantic Canada, and the Territories.
- A future visit could include Toronto or Vancouver.

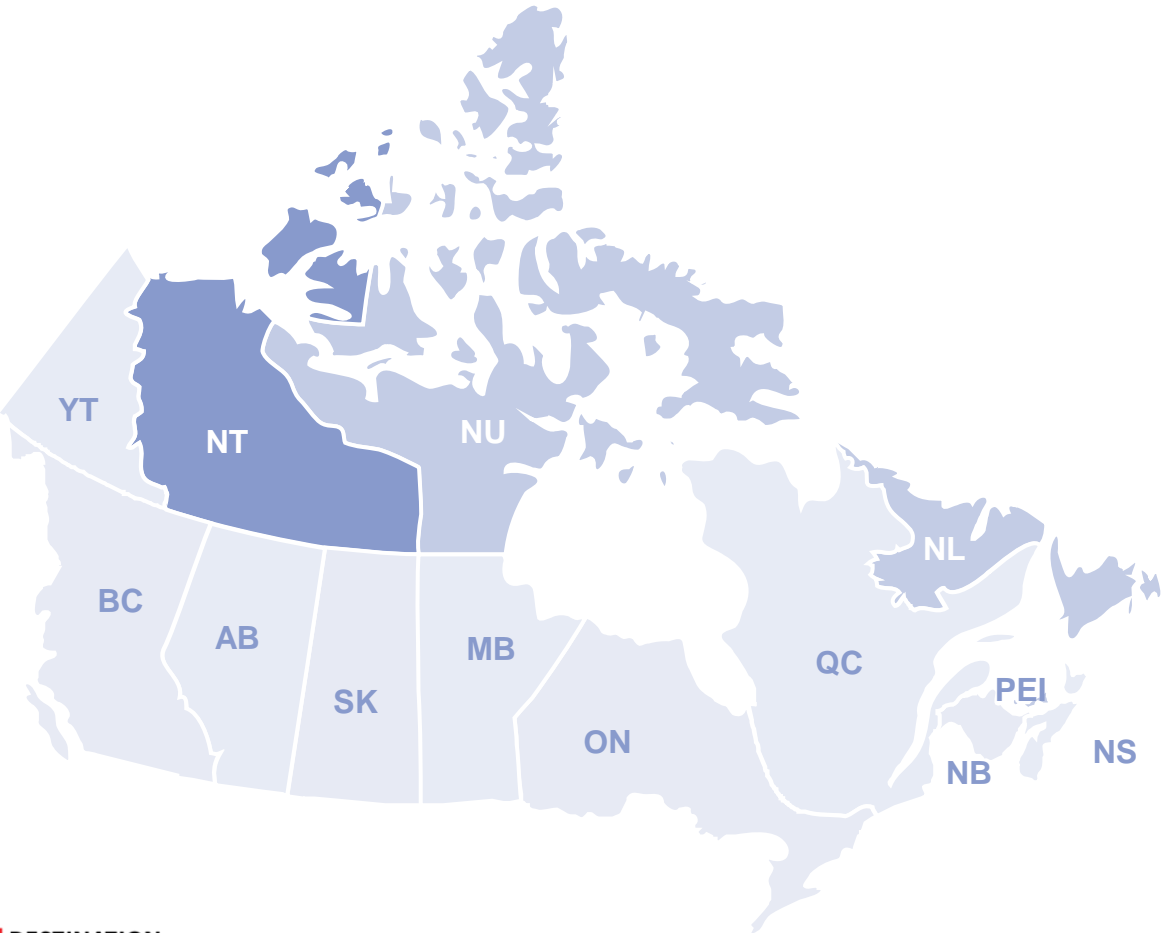


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	30%	97
BC	44%	80
MB	4%	92
NB	10%	112
NL	8%	116
NS	12%	100
NT	7%	125
NU	3%	122
ON	41%	112
PEI	10%	121
QC	29%	103
SK	4%	87
YT	5%	91



# CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- Most travel to Canada has been done during the summer as well as January and February.
- A number of us are likely to return to Canada but probably not in the next couple of years, especially those who have visited before.
- Overall, our knowledge of Canada as a travel destination has an opportunity to grow.



## CANADA TRAVEL MONTHS ON A PAST TRIP

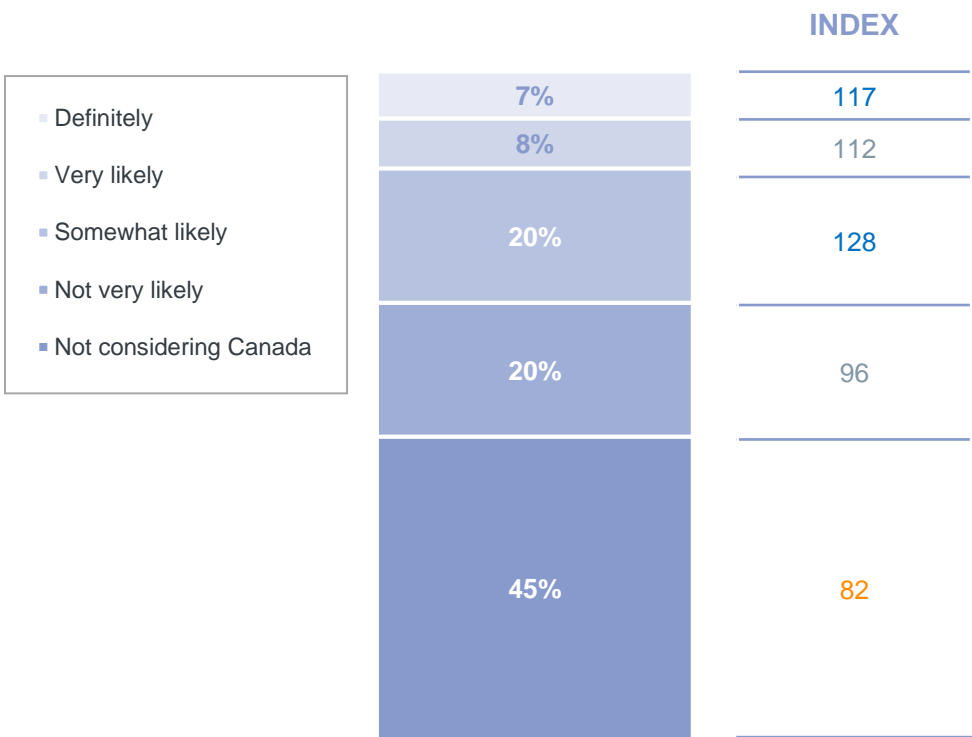
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CULTURE SEEKERS	25%	28%	38%	25%
VS. TOTAL MARKET	22%	28%	42%	25%

17%

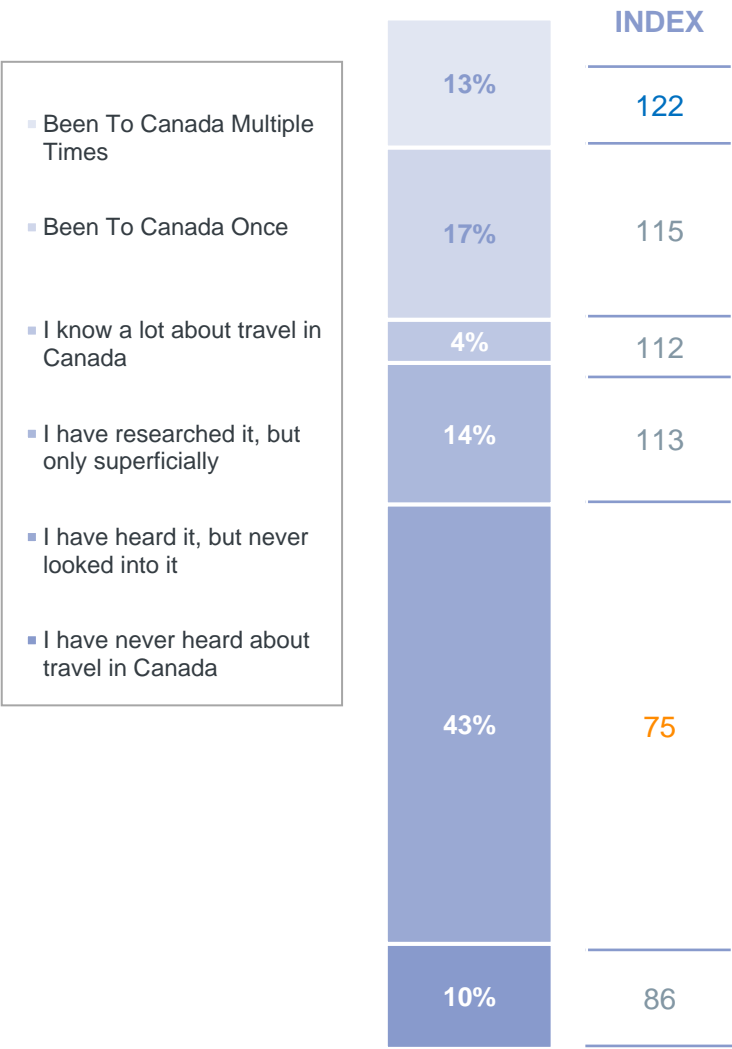
Been to Canada in last 5 years  
128 INDEX SCORE



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



### MAJOR LIFE EVENTS IN LAST 5 YEARS

7%

Had a child

96 INDEX SCORE

38%

Started a new job / career

116 INDEX SCORE

19%

Bought a new home

113 INDEX SCORE

16%

Moved to a new city

111 INDEX SCORE

8%

Child started school

99 INDEX SCORE

41%

Purchased a car

114 INDEX SCORE

6%

Retired

98 INDEX SCORE

20%

Renovated house

109 INDEX SCORE



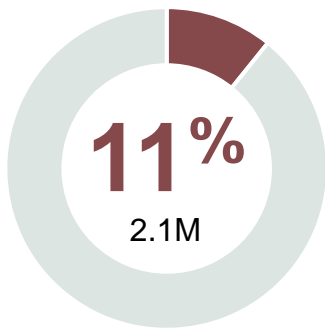
### NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	62%	101
Savings and investments	45%	73
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	44%	104
Experiences (e.g., concerts, events).	35%	113
Personal care and wellness	34%	70
Technology and gadgets	25%	143



# REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



## % OF AUSTRALIA POPULATION

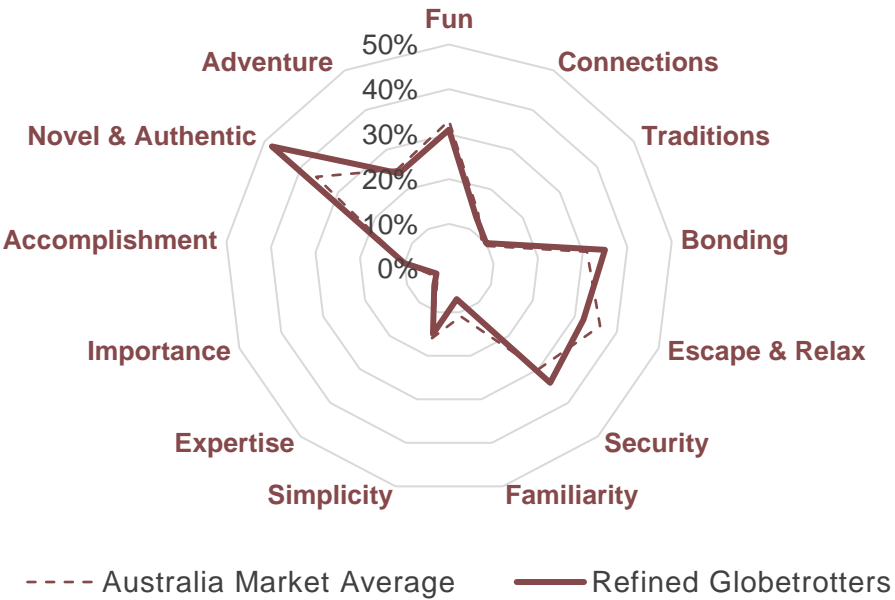
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross of our list.

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 Being open to new perspectives and learning about new cultures is important part of our travels.

### 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

135

#### 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
Exploring the world through travel is an important milestone of growing up	83%	124
I'm always on the look out for new destinations to visit next	81%	126
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	73%	127
I'm passionate about travelling	70%	118
I'm a planner, while travelling I like to know what comes next	68%	150
I make sure to visit the "famous" sites wherever I go	66%	146
I tend to not think about my budget too much when travelling	62%	148
Luxury experiences are an important part of travel	58%	152
While I think about value for money, it doesn't tend to influence my choice of destination	56%	134
I enjoy joining guided tours to explore new destinations	47%	149
I seek travel advice from travel agencies and agents	41%	138
When traveling, I expect 24 / 7 support from a travel provider	35%	131
I seek out fine dining experiences and gourmet cuisine when I travel	34%	141



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	61%	137
To feel safe and secure	45%	112
To share quality time with others	44%	108
To have authentic experiences	43%	122
To open my mind to new perspectives	41%	130
To be proud to share my travel experiences	28%	122



## DESIRED DESTINATION

	SCORE	INDEX
Authentic	50%	138
Luxurious	34%	155
Unique	31%	118
World-Class	26%	155
Charming	26%	128
Exclusive	18%	152



# REFINED GLOBETROTTERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

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



### AGE

	SCORE	INDEX
18-34	22%	81
35-54	27%	90
55+	51%	116
MEAN YEARS	52.4	116



### HH INCOME (CAD)

	SCORE	INDEX
\$35K or less	10%	53
>\$35K to \$105K	70%	131
More than \$105K	16%	147
Refused	4%	107



### EMPLOYMENT

	SCORE	INDEX
Employed FT	41%	99
Employed PT	14%	86
Self-employed	6%	106
Retired	32%	115



### EDUCATION

	SCORE	INDEX
Primary education or less	0%	80
Secondary education	22%	92
Post-secondary education	78%	111



**87%**  
134 Have a valid passport



### GENDER

**45%** 93 Male

**55%** 108 Female

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



### HOUSEHOLD

**19%** 91 Children <18 Living At Home\*

**12%** 122 Children 18+ Living At Home\*

**32%** 110 Children NOT Living At Home\*

**49%** 107 No Children

\* Option is not exclusive



### AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	34%	102
Victoria	29%	116
Queensland	19%	97
Western Australia	10%	104

	SCORE	INDEX
South Australia	5%	66
Tasmania	3%	108
Australian Capital Territory	2%	97





# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

## TRAVEL TRADE INDEX: NON-GROUP

136

## TRAVEL TRADE INDEX: GROUP

136

**! KEY** terminology on this page

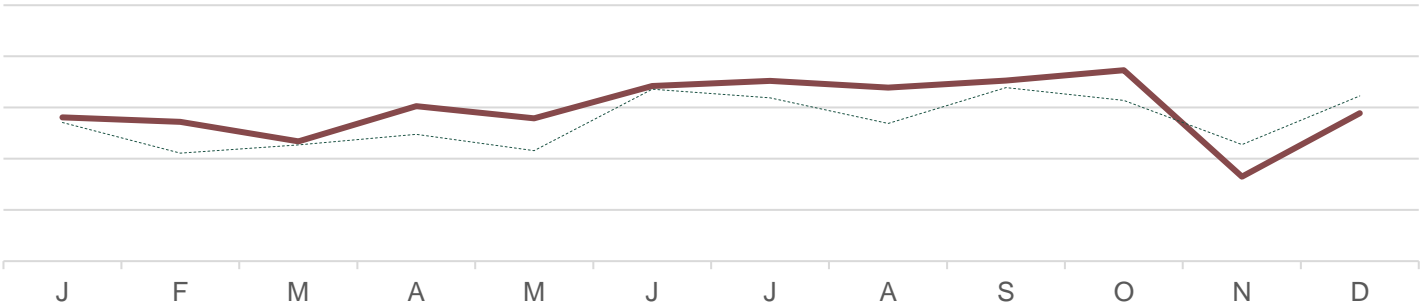
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **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](#)

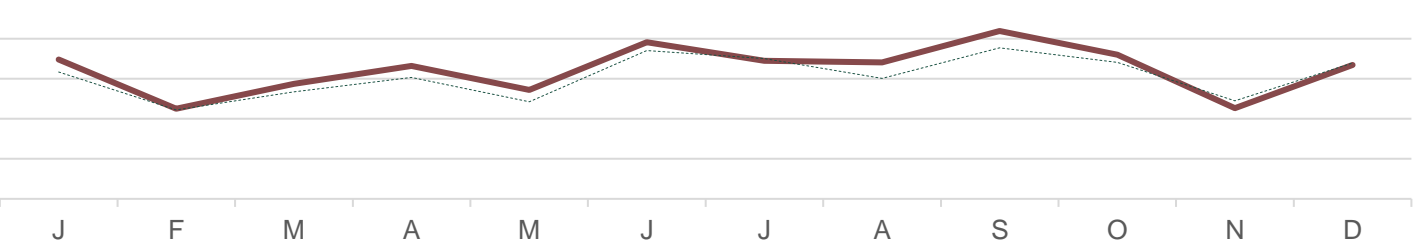


### TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



### TRIP DURATION

INDEX

1-2 Days	37%	103
3-5 Days	23%	105
1 Week Holiday	14%	107
2 Weeks Holiday	12%	123
3 Weeks Or More	6%	106

Incidence is frequency of 2+ times per year



### TRIP TYPE

INDEX

Domestic Leisure	41%	86
International Leisure	12%	122
Business Trip	7%	97
Added Personal To Business	4%	102
Worked During Vacation	4%	98

Incidence is frequency of 2+ times per year



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	42%	77
Premium Hotel	34%	145
Vacation Rental (e.g., Airbnb, Vrbo)	19%	81
Friend's or family's place	18%	67
All-inclusive resort	15%	151
High-end / Luxury Hotel	15%	154



## 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

16%

115 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	80%	127
I really want to learn about the history of the destinations I visit	78%	119
I'm willing to put in the effort while travelling in order to see lesser-known places	48%	93
I like to explore places that are off the beaten path and less explored	43%	87
I'm open to travelling to destinations with limited tourist infrastructure	34%	79
I'm open to visiting destinations with challenging climates or weather conditions	26%	87



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

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



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	69%	120
Adult relatives	19%	92
Kids	13%	93
Solo	12%	86
Friends	9%	96



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

\$4,680

141  
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%	113
I consider the impact that I personally have on the destinations I visit	48%	96
It's important to me that I visit somewhere that is open to diversity	42%	92
Hearing from underrepresented communities is an important part of travelling	38%	104
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	28%	96

37%

## PRIORITIZE SUSTAINABLE TRAVEL

98 INDEX SCORE

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

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



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES















## OVERALL INSIGHT

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



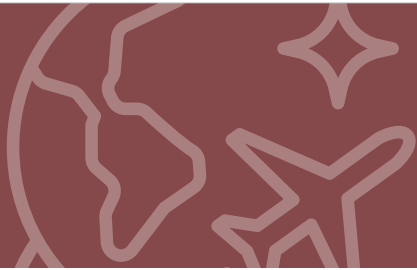
## TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Cultural experiences or attractions	66%	131
○ Museums	47%	139
○ Historical or archeological sites	43%	140
○ Visiting local monuments	39%	132
 Local cuisine	67%	138
○ Local restaurants	56%	135
○ Luxury dining	26%	151
 Guided tours	45%	145
○ City tours	30%	147
○ Wildlife or nature tours	28%	143
 Overnight experiences	30%	140
○ Cruise	19%	149
○ Staying at all-inclusive resort	14%	151
 Health and wellness	21%	137
○ Spas	15%	140
○ Meditation or yoga	8%	136
 Nature experiences	50%	96
 Shopping	46%	110
 Festivals and events	24%	89
 Family-focused attractions	23%	91
 Water-based sports	10%	90
 Nightlife	10%	89
 Casual sports	7%	64



# 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	68%	105	58%	94
To escape from routine	37%	85	34%	84
To spend time with family	33%	90	41%	98
To learn through other cultures	35%	118	44%	123
For adventure and excitement	26%	93	26%	90
To check off dream travel places	23%	127	30%	118
To have fun with friends	19%	96	11%	70
For a romantic getaway	16%	109	9%	96
To be pampered	15%	131	10%	121



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	65%	130	57%	117
Visiting friends / family	43%	108	39%	99
Special event (e.g., wedding, reunion)	27%	101	22%	92
Family / friends wanted to go	27%	77	23%	86
Festival or event	11%	71	13%	77
Kids wanted to go	11%	93	11%	94

16% 93  
INDEX SCORE

Travel aligns with  
children’s school schedule

25% 97  
INDEX SCORE

Take time off for vacation  
during major holidays

13% 74  
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.

61%

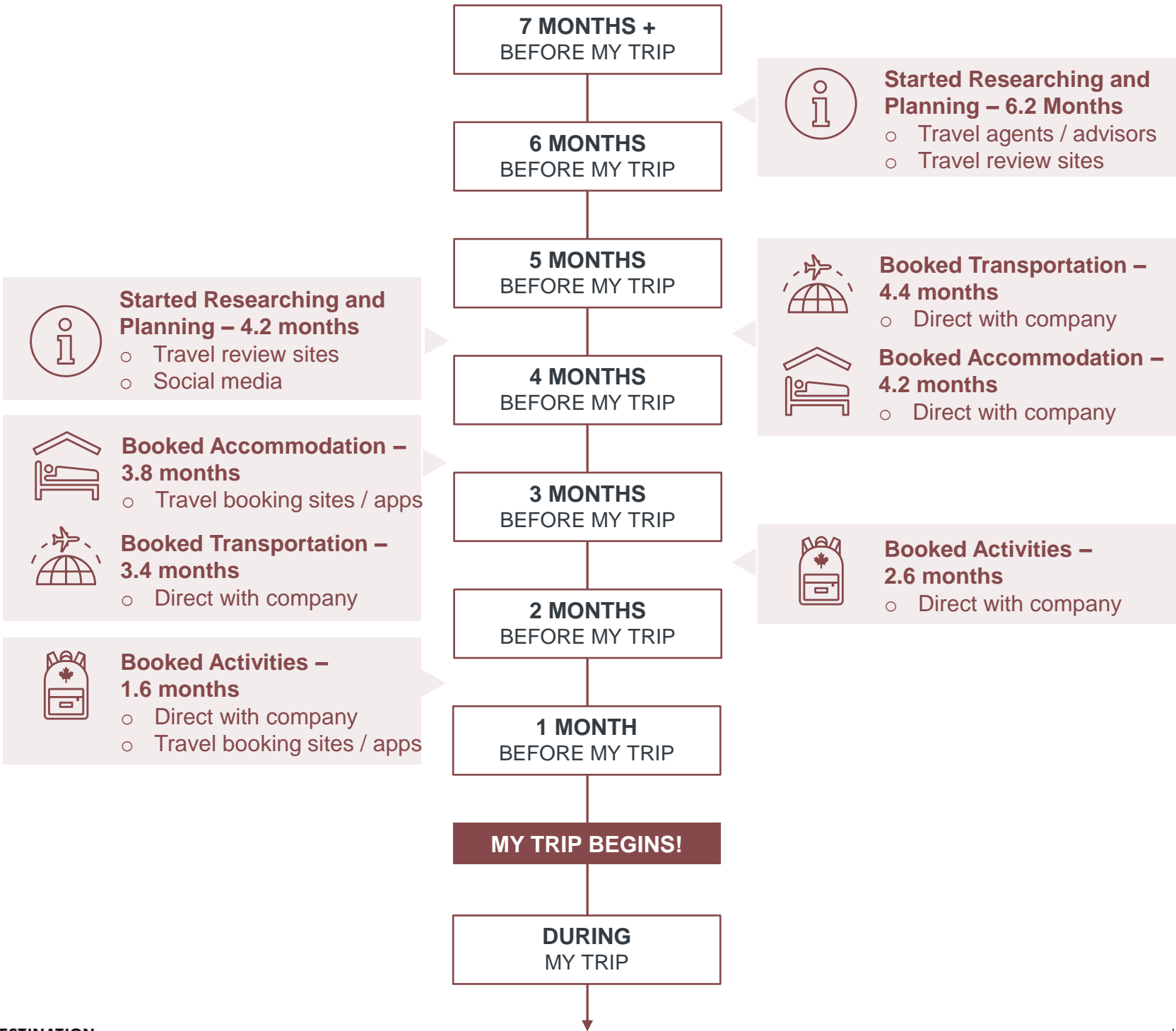
Primary Trip Planner

88 INDEX SCORE

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

FLIGHT OF  
3–7 HOURS

FLIGHT OF  
7+ HOURS








# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips explore culture in must-see cities or small towns.
- 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.





# REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

- We enjoy exploring well-known and developed destinations, with access to nature, through curated experiences.
- We travel everywhere, close to home, as well as Europe, Asian countries and North America.



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Australia	49%	85	USA	4%	115
New Zealand	5%	116	Singapore	4%	134
UK	4%	128	Italy	3%	112
Indonesia	4%	118	Thailand	3%	129
Japan	4%	105	France	3%	100



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	44%	129
Renowned for food and drink experiences	42%	139
Has famous attractions	37%	140
Known for stunning natural landscapes	36%	115
Has a variety of museums and / or historical sites	31%	123
Has luxury dining, shopping, and accommodations	29%	152
Has well-developed tourism infrastructure	20%	149
Offers all-inclusive resort packages	19%	151



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

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



## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	28%	89
BC	59%	116
MB	2%	80
NB	6%	96
NL	3%	85
NS	6%	70
NT	3%	94
NU	3%	118
ON	41%	112
PEI	5%	93
QC	32%	110
SK	8%	111
YT	8%	112



# 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.



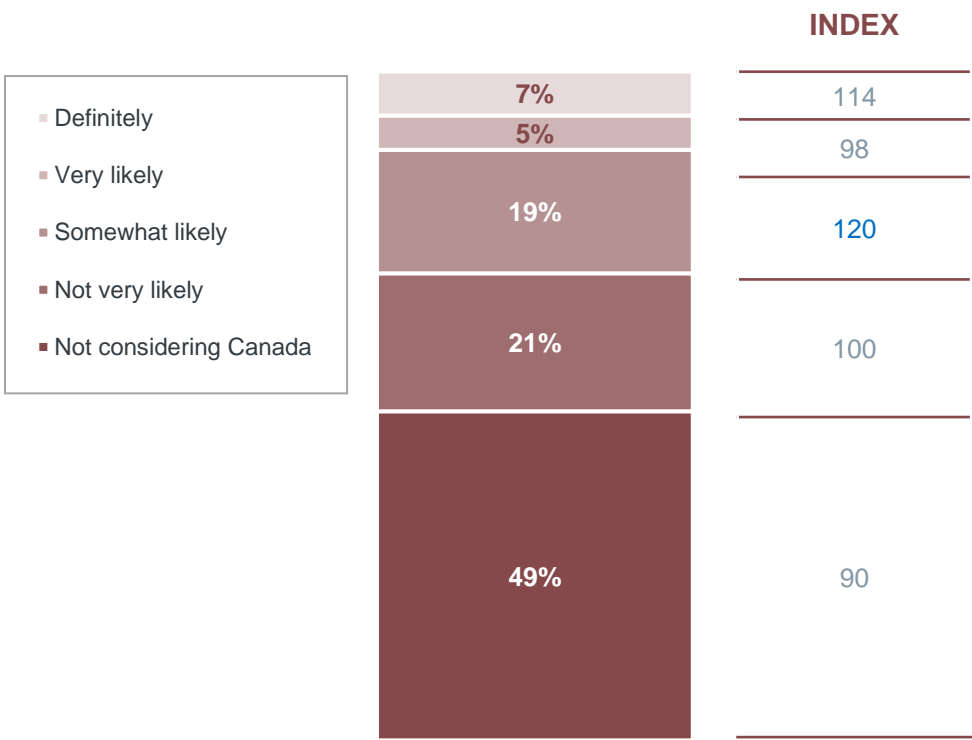
## CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	15%	26%	45%	26%
VS. TOTAL MARKET	22%	28%	42%	25%

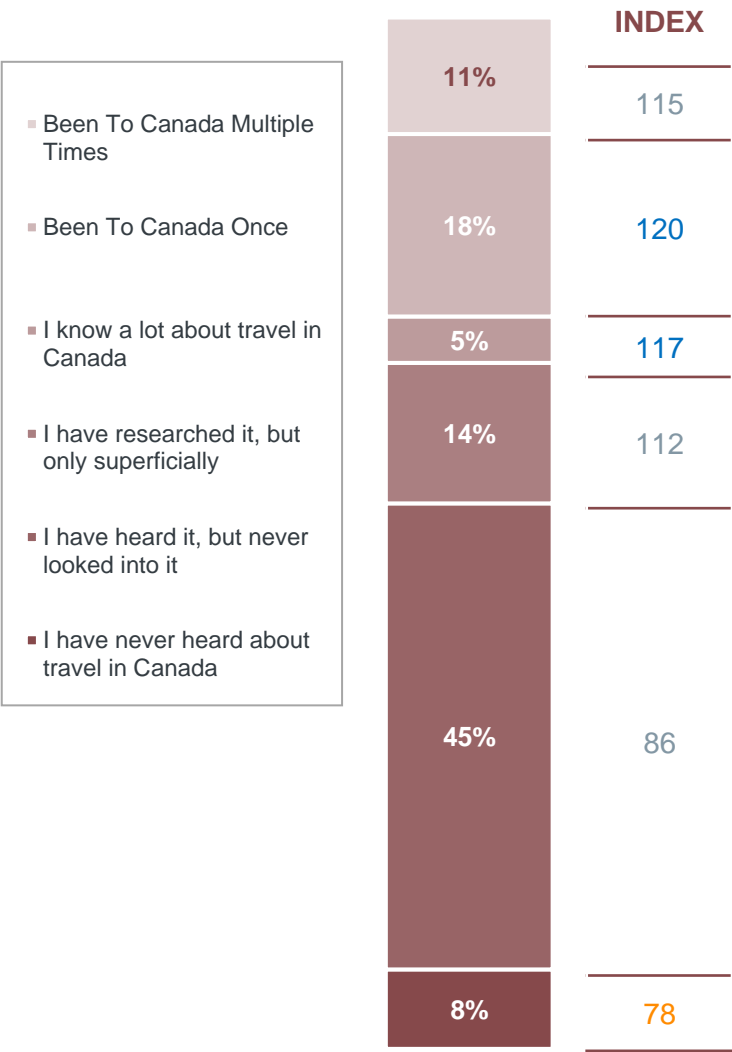
13% **Been to Canada in last 5 years**  
109 INDEX SCORE



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



### MAJOR LIFE EVENTS IN LAST 5 YEARS

3%

Had a child  
89 INDEX SCORE

27%

Started a new job / career  
84 INDEX SCORE

20%

Bought a new home  
125 INDEX SCORE

12%

Moved to a new city  
80 INDEX SCORE

4%

Child started school  
92 INDEX SCORE

42%

Purchased a car  
116 INDEX SCORE

9%

Retired  
118 INDEX SCORE

25%

Renovated house  
141 INDEX SCORE



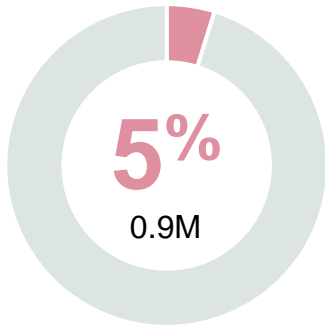
### NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	75%	138
Savings and investments	49%	101
Personal care and wellness	40%	117
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	34%	66
Experiences (e.g., concerts, events).	33%	103
Home and decor	22%	102



# PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



## % OF AUSTRALIA POPULATION

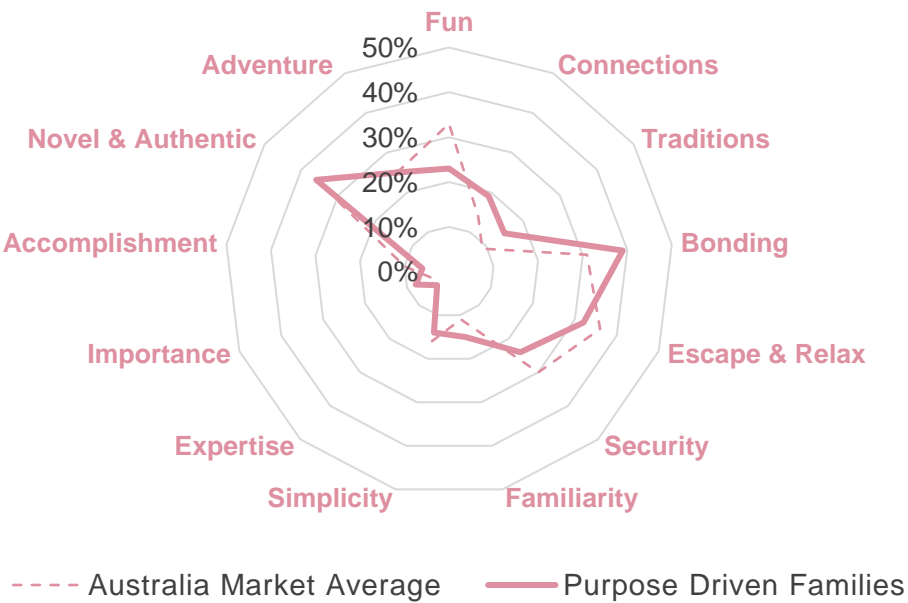
We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish trendy destinations, hidden gems that support local cultures, and anywhere that lets us spend time in nature.

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

127

#### 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

117

#### How is this calculated?

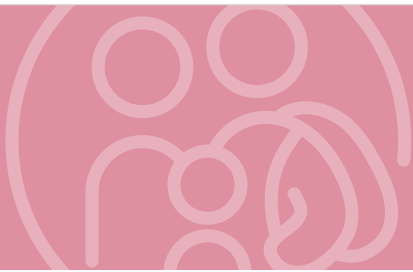
The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative 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 creating memories, and we will tackle a few challenges to achieve that.
- We are passionate about travel, and seek free-spirited destinations that will make our friends say 'wow'.



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Trying out local cuisine is a really important part of travel	78%	127
I like to be able to take my time at a historic site or in a museum and not feel rushed	76%	133
I'm passionate about travelling	74%	123
I am more likely to select destinations / activities that invest in socially responsible tourism	72%	135
I like my holiday to have some form of physical activity	66%	118
I generally think natural attractions are the highlights of my trip	62%	121
I learn the basics of a language before visiting a country / region	58%	126
Videos and pictures on social media inspire me to travel	52%	125
I'm open to unconventional accommodations when travelling	51%	128
I tend to not think about my budget too much when travelling	51%	117
I enjoy living in the moment while travelling and don't worry much about what comes next	49%	125
When there's a lot of positive buzz about a destination it makes me want to visit it more	42%	124
I'd be open to using AI-powered chatbots for travel planning and assistance	32%	130



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	47%	115
To bond through shared experiences	31%	117
To be proud to share my travel experiences	30%	126
To feel like a local	19%	123
To create new, or take part in old, traditions	15%	133
To feel like I'm important	8%	127



## DESIRED DESTINATION

	SCORE	INDEX
Accepting	26%	119
Open	24%	128
Passionate	20%	151
Caring	20%	141
Free-Spirited	20%	123
Familiar	15%	111



# 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	34%	114
35-54	60%	140
55+	6%	65
MEAN YEARS	38.6	67



### HH INCOME (CAD)

	SCORE	INDEX
\$35K or less	17%	85
>\$35K to \$105K	69%	122
More than \$105K	11%	115
Refused	3%	74



### EMPLOYMENT

	SCORE	INDEX
Employed FT	53%	132
Employed PT	23%	133
Self-employed	6%	100
Retired	2%	64



### EDUCATION

	SCORE	INDEX
Primary education or less	1%	136
Secondary education	20%	81
Post-secondary education	79%	116



73%

103 Have a valid passport



### GENDER

45%

93 Male

53%

104 Female

2%

155 Non-binary / Other



### HOUSEHOLD

86%

140 Children <18 Living At Home\*

8%

77 Children 18+ Living At Home\*

3%

66 Children NOT Living At Home\*

11%

62 No Children

\* Option is not exclusive



### AUSTRALIA STATE BREAKOUT

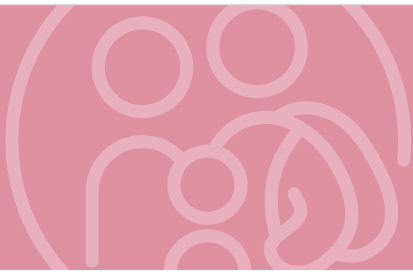
	SCORE	INDEX
New South Wales	34%	106
Victoria	29%	117
Western Australia	12%	124
Queensland	12%	58

	SCORE	INDEX
South Australia	5%	77
Tasmania	4%	146
Australian Capital Territory	4%	158



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS



## TRAVEL TRADE INDEX: NON-GROUP

90

## TRAVEL TRADE INDEX: GROUP

94

**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

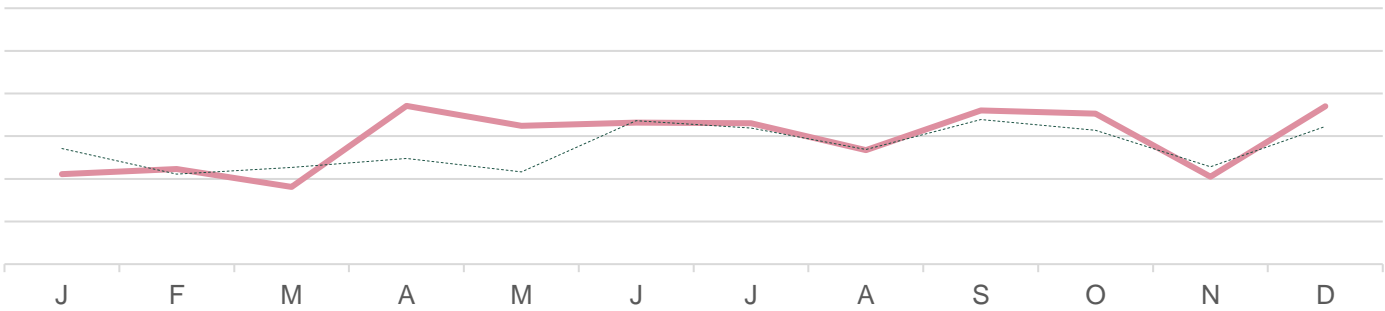
For additional definitions see [Glossary](#)



### TYPICAL TRAVEL MONTHS

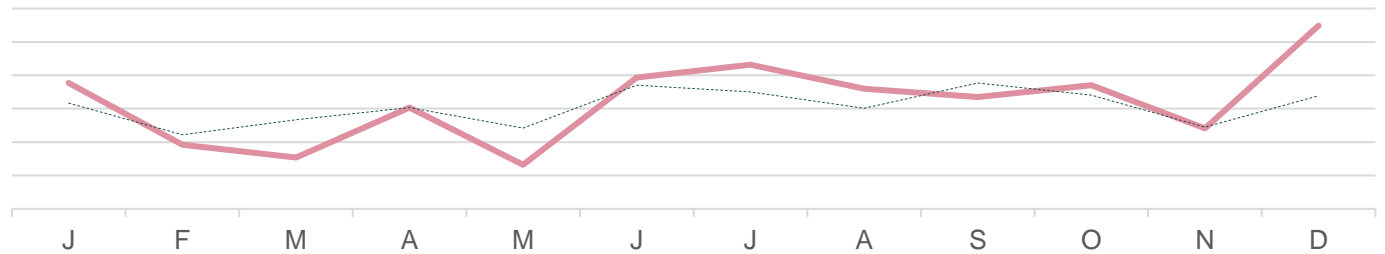
For Flights of 3–7 Hours

— Purpose Driven Families  
..... Market Average



For Flights of 7+ Hours

— Purpose Driven Families  
..... Market Average



### TRIP DURATION

INDEX

1-2 Days	43%	142
3-5 Days	22%	98
1 Week Holiday	13%	104
2 Weeks Holiday	9%	102
3 Weeks Or More	7%	113

*Incidence is frequency of 2+ times per year*



### TRIP TYPE

INDEX

Domestic Leisure	48%	157
International Leisure	12%	124
Business Trip	13%	125
Added Personal To Business	7%	119
Worked During Vacation	10%	138

*Incidence is frequency of 2+ times per year*



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	41%	74
Vacation Rental (e.g., Airbnb, Vrbo)	28%	135
Premium Hotel	27%	121
Friend's or family's place	20%	75
Campsite	15%	111
Budget Hotel	14%	114



## THOUGHTS ON INDIGENOUS TRAVEL

59%

121 INDEX SCORE

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

12%

98 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	73%	106
I'm willing to put in the effort while travelling in order to see lesser-known places	66%	123
I like to explore places that are off the beaten path and less explored	63%	117
I'm open to travelling to destinations with limited tourist infrastructure	57%	120
I'm open to visiting destinations with challenging climates or weather conditions	41%	117



# 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	75%	134
Kids	66%	136
Adult relatives	16%	74
Solo	8%	72
Friends	3%	59



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

\$4,080

121  
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	73%	135
It's important to me that I visit somewhere that is open to diversity	69%	132
It's important for me to know that the money I spend will support the local economy I'm visiting	57%	96
Hearing from underrepresented communities is an important part of travelling	49%	122
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	48%	132

53%

PRIORITIZE  
SUSTAINABLE  
TRAVEL

125 INDEX SCORE

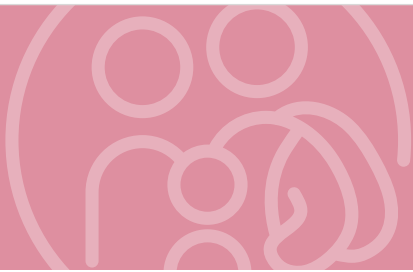
**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **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 off the beaten path and find wildlife to view.
- Cultural education is also important..



### TOP DESIRED TRAVEL ACTIVITIES

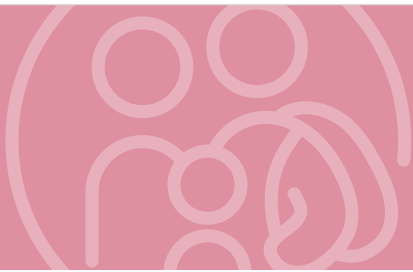
	SCORE	INDEX
 Family-focused attractions	64%	131
○ Zoos or aquariums	52%	132
○ Amusement parks or theme parks	50%	136
○ Space or science centres	27%	145
 Nature experiences	56%	108
○ Viewing wildlife in natural habitat	30%	118
○ Explore wilderness or backcountry	27%	130
 Cultural experiences or attractions	55%	108
○ Art galleries	26%	110
○ History or culture lessons	21%	124
 Water-based sports	25%	137
○ Swimming	19%	138
○ Kayaking, canoeing, or paddle-boarding	13%	138
 Winter-based sports	11%	131
○ Snowboarding or downhill skiing	6%	124
○ Ice skating or hockey	4%	144
 Local cuisine	50%	102
 Shopping	32%	84
 Festivals and events	26%	95
 Overnight experiences	24%	99
 Guided tours	20%	79
 Health and wellness	16%	103
 Casual sports	12%	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	53%	115	70%	131
To relax and unwind	59%	87	58%	94
To escape from routine	45%	104	50%	130
For adventure and excitement	21%	80	29%	97
To learn through other cultures	38%	125	18%	72
To have memories from top travel spots	12%	105	1%	64
To have fun with friends	9%	56	20%	121
For a romantic getaway	11%	89	6%	78
To check off dream travel places	21%	117	26%	103



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	43%	91	59%	119
Kids wanted to go	41%	128	47%	131
Family / friends wanted to go	35%	114	50%	150
Visiting friends / family	31%	66	50%	148
Special event (e.g., wedding, reunion)	25%	93	30%	121
Festival or event	20%	107	15%	84

63% 146  
INDEX SCORE

Travel aligns with  
children’s school schedule

50% 151  
INDEX SCORE

Take time off for vacation  
during major holidays

23% 127  
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.

61%

Primary Trip Planner

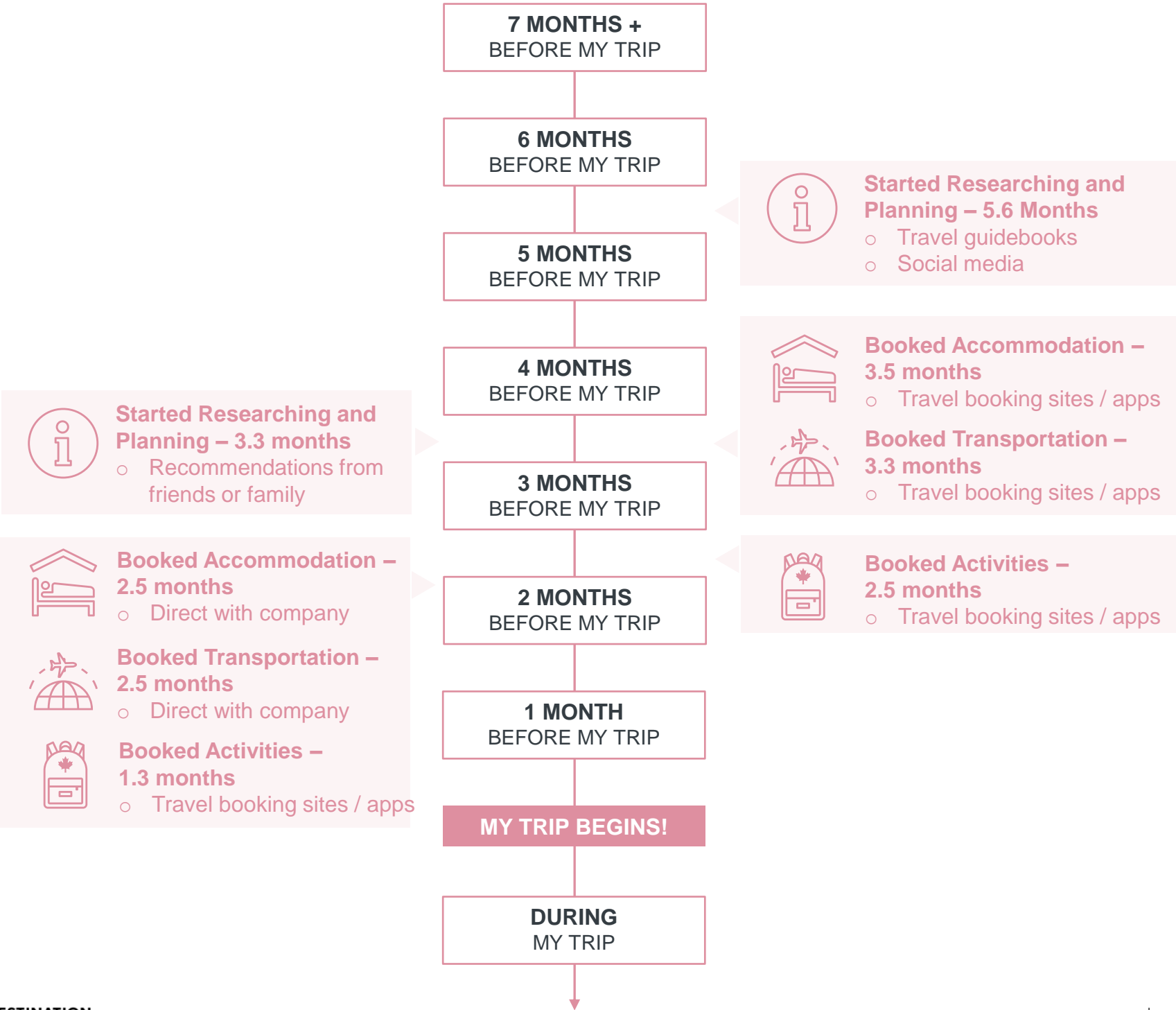
85 INDEX SCORE

! **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






# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips explore new places and expose of us to new foods and activities.
- We also take trips like Culture Seekers and 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		56%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Bonding	Fun
ACTIVITIES	Local restaurants		42%
	Visiting local monuments		30%
	Nature walks		25%
KEY BEHAVIOURS	Seeking a world-class cultural experience. Spending more for authentic experience		



TRIP TYPE	Countryside & Village		
COMPANIONS	Nuclear family with kids		67%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Nature walks		36%
	Local restaurants		28%
	Visiting nature parks or preserves		21%
KEY BEHAVIOURS	Staying in a vacation rental, exploring natural landscape. Our most budget-friendly trip		



TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		65%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Amusement parks or theme parks		36%
	Oceanside beaches		30%
	Outdoor markets		28%
KEY BEHAVIOURS	Booking in advance, all for the kids, focussed on ease and relaxation		

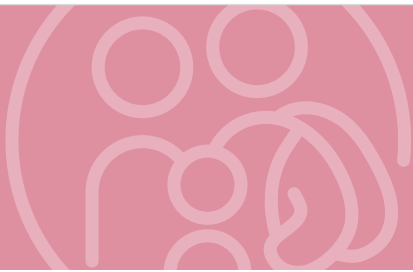


TRIP TYPE	Urban Centre		
COMPANIONS	Couple only		28%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Security
ACTIVITIES	Local restaurants		44%
	Museums		30%
	Visiting famous shopping centres		29%
KEY BEHAVIOURS	Planned in advance, spending more, visiting friends, and exploring a new culture		



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

- We are looking for unique hidden gems alongside trendy spots.
- Most of our travel is closer to home, but we also explore European countries.

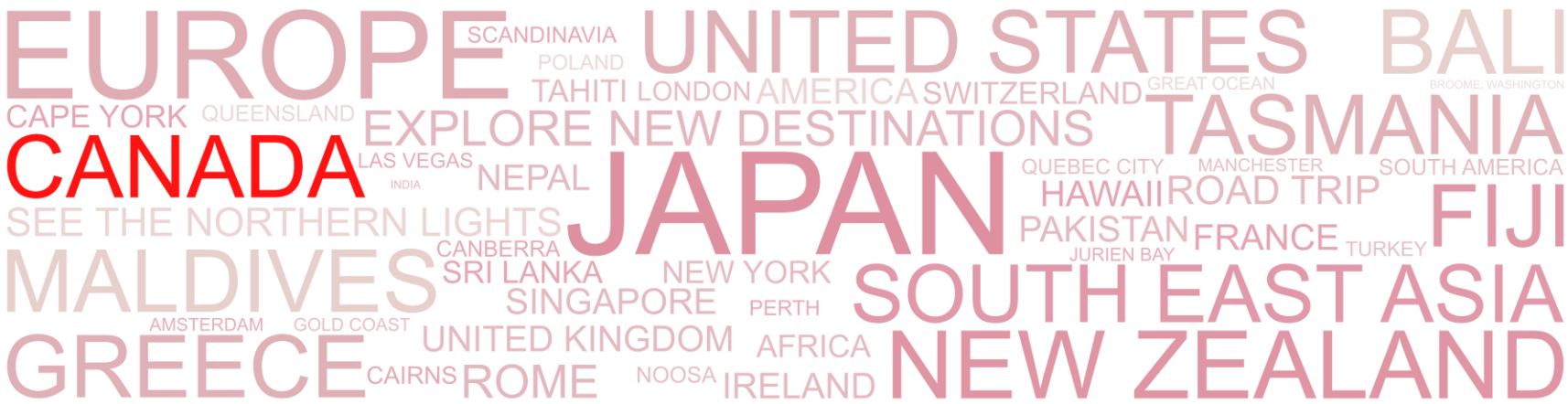


## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Australia	54%	95	Fiji	3%	143
New Zealand	5%	116	India	3%	135
Japan	5%	131	Singapore	3%	113
Indonesia	4%	88	Thailand	3%	123
Greece	3%	136	UK	3%	91



## WHERE DO WE WANT TO GO



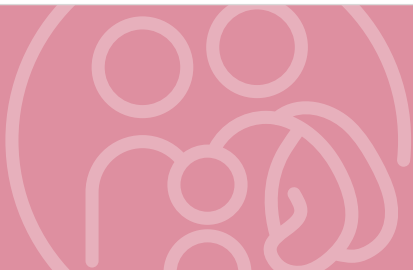
## DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	83%	143
Has a rich cultural and historical heritage	36%	115
Has famous attractions	29%	118
Has many hidden gems	28%	124
Has a variety of museums and / or historical sites	27%	114
Is inclusive and tolerant	25%	120
Provides a remote, no-frills experience	14%	130
Provides numerous opportunities for outdoor adventures	17%	109



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- Our top destinations in Canada so far are Ontario, Alberta and Atlantic provinces.
- Toronto and Vancouver are big cities on our list, but we are also thinking about more specific places like Niagara Falls or Whistler.

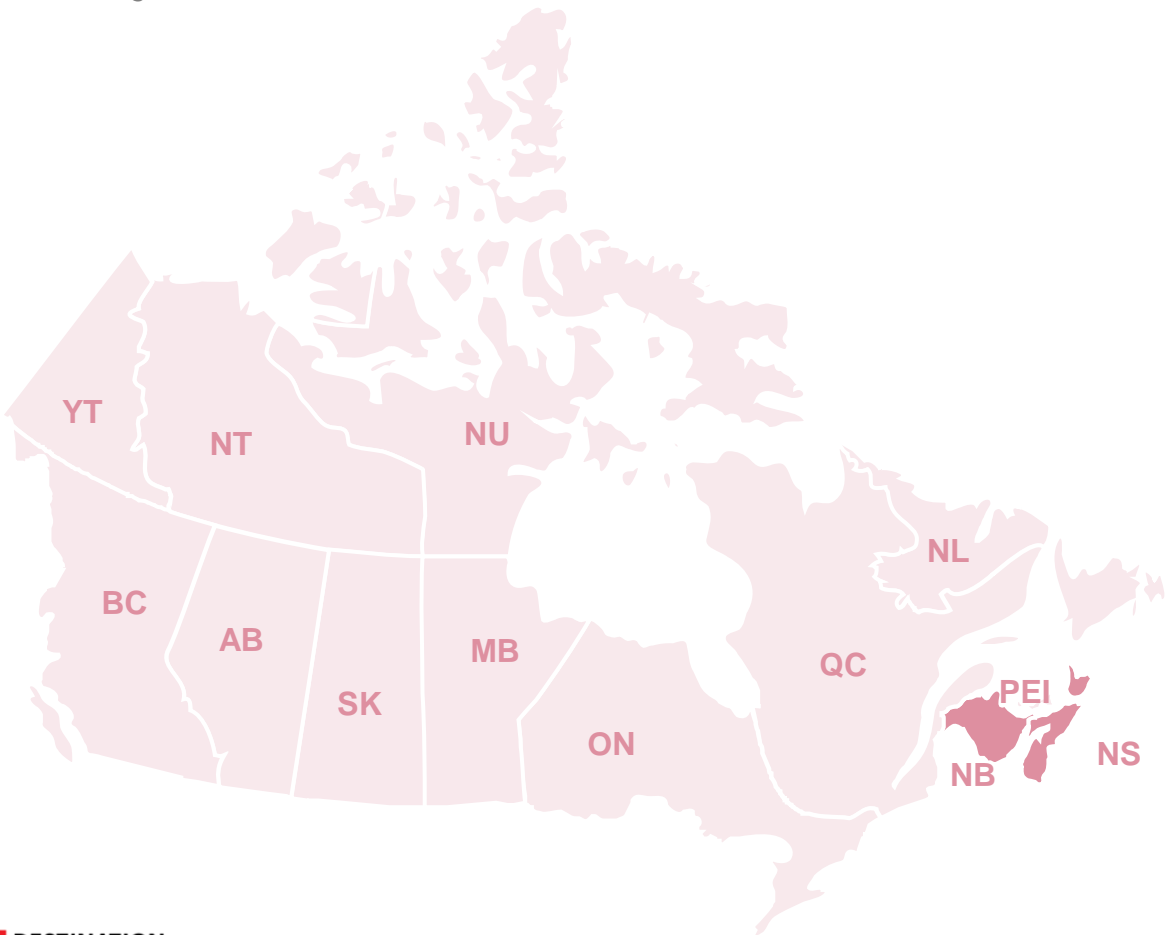


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	34%	113
BC	46%	85
MB	0%	66
NB	18%	146
NL	0%	67
NS	17%	130
NT	0%	64
NU	0%	70
ON	37%	100
PEI	0%	68
QC	21%	86
SK	0%	60
YT	0%	60



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- We visit Canada near the end of winter or early spring.
- If we haven't been yet, we would like to in the next few years.
- We have good familiarity with Canada.



## CANADA TRAVEL MONTHS ON A PAST TRIP

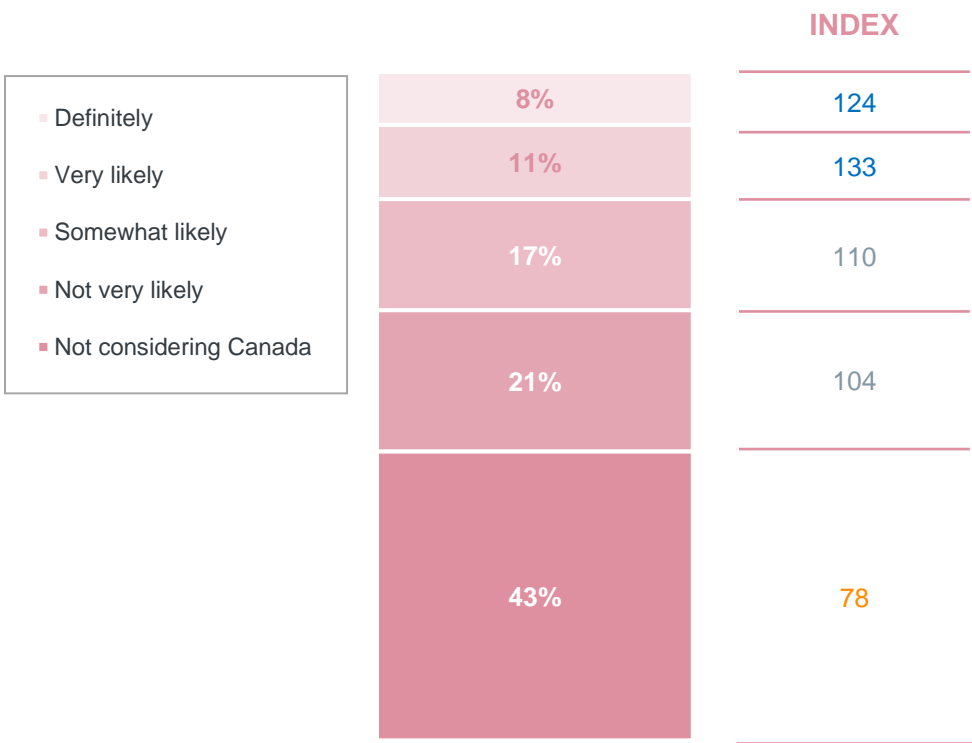
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	19%	30%	42%	26%
VS. TOTAL MARKET	22%	28%	42%	25%

10%

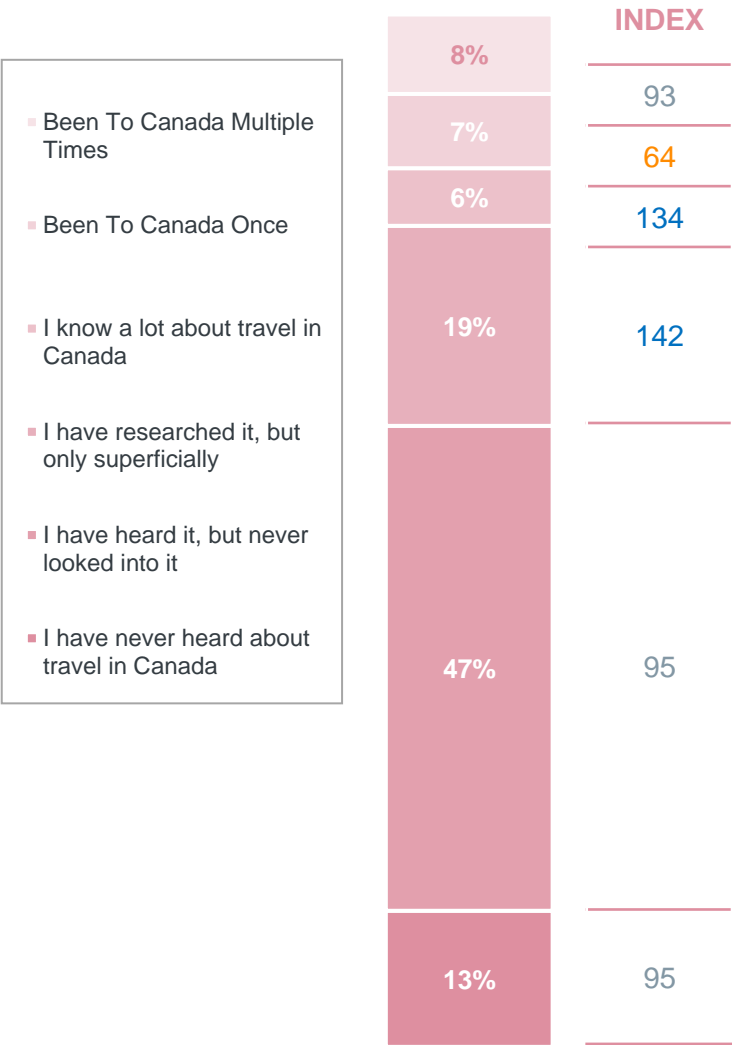
Been to Canada in last 5 years  
98 INDEX SCORE



## LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



## FAMILIARITY WITH CANADA

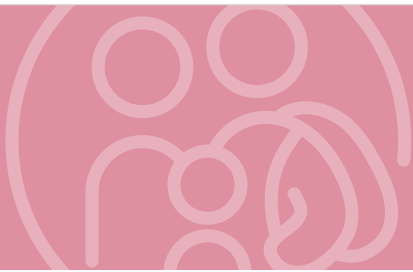






# PURPOSE DRIVEN FAMILIES

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

23%

Had a child

127 INDEX SCORE

42%

Started a new job / career

130 INDEX SCORE

17%

Bought a new home

100 INDEX SCORE

17%

Moved to a new city

119 INDEX SCORE

22%

Child started school

127 INDEX SCORE

41%

Purchased a car

112 INDEX SCORE

1%

Retired

61 INDEX SCORE

20%

Renovated house

110 INDEX SCORE



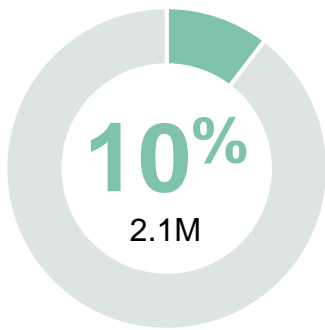
### NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	58%	88
Savings and investments	52%	123
Personal care and wellness	42%	137
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	34%	65
Experiences (e.g., concerts, events).	31%	96
Home and decor	28%	127



# CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



## % OF AUSTRALIA 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

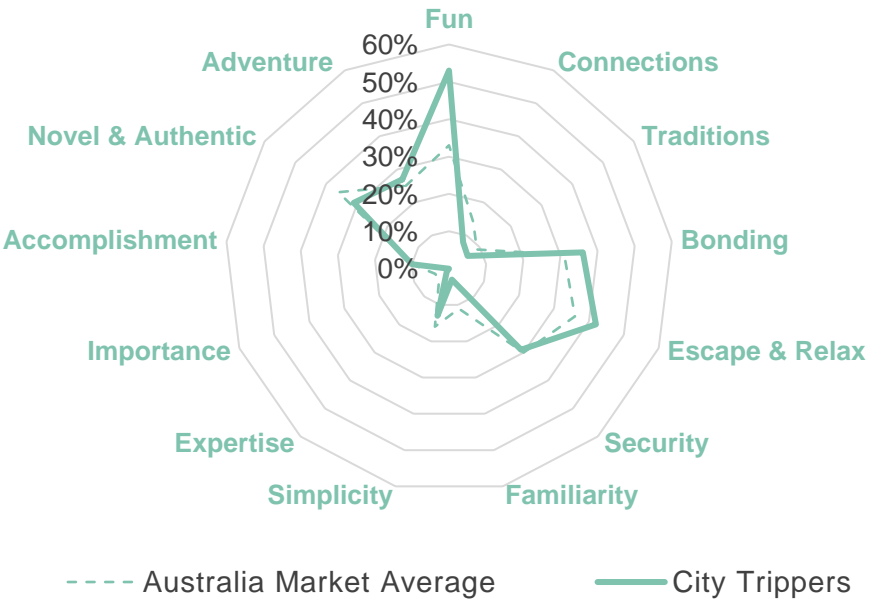
We prioritize fun and social settings and seek experiences that are worth sharing on social media.
- 2

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

We prefer the company of friends during travels to share experiences directly. Our travel group is generally adults only.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

80

#### How is this calculated?

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



### TRAVELLER ECONOMIC INDEX

87

#### How is this calculated?

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



# CITY TRIPPERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

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



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	88%	144
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	83%	125
I prefer destinations with well-established tourist infrastructure	70%	129
I generally stick to the most popular areas when I visit somewhere	66%	127
I generally don't think much on the impact that I personally have on the destinations I visit	65%	124
I like natural attractions but I don't usually think they are the highlights of my trip	60%	128
I love posting my trips on social media to share with friends	55%	127
I will generally not go out of my way to buy local when travelling	50%	126
Videos and pictures on social media inspire me to travel	49%	117
I'm more interested in the present and don't focus much on the history of where I visit	48%	130
When there's a lot of positive buzz about a destination it makes me want to visit it more	43%	126
I enjoy the beauty of nature without reflecting too much on its significance	42%	128
I prefer to explore quickly and cover as much ground as possible at historic sites or museums	34%	124



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	74%	136
To indulge myself and live in the moment	49%	149
To share quality time with others	47%	114
To find much-needed time to relax	45%	113
To have a fun, social setting	45%	152
To let loose and forget about day-to-day life	35%	129



## DESIRED DESTINATION

	SCORE	INDEX
Fun	72%	141
Friendly	68%	115
Sociable	32%	147
Adventurous	22%	101
Carefree	20%	108
Trendy	12%	149



# CITY TRIPPERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

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



### AGE

	SCORE	INDEX
18-34	37%	121
35-54	31%	96
55+	32%	94
MEAN YEARS	44.7	88



### HH INCOME (CAD)

	SCORE	INDEX
\$35K or less	27%	128
>\$35K to \$105K	63%	68
More than \$105K	6%	75
Refused	5%	124



### EMPLOYMENT

	SCORE	INDEX
Employed FT	41%	98
Employed PT	22%	128
Self-employed	3%	61
Retired	18%	91



### EDUCATION

	SCORE	INDEX
Primary education or less	0%	80
Secondary education	31%	130
Post-secondary education	69%	71



**68%**  
92 Have a valid passport



### GENDER

**40%** 79 Male

**60%** 121 Female

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



### HOUSEHOLD

**18%** 90 Children <18 Living At Home\*

**11%** 107 Children 18+ Living At Home\*

**25%** 99 Children NOT Living At Home\*

**58%** 117 No Children

\* Option is not exclusive



### AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	30%	70
Victoria	26%	95
Queensland	20%	108
Western Australia	12%	124

	SCORE	INDEX
South Australia	8%	118
Tasmania	2%	100
Australian Capital Territory	1%	95



# CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

## TRAVEL TRADE INDEX: NON-GROUP

81

## TRAVEL TRADE INDEX: GROUP

80

**KEY** terminology on this page

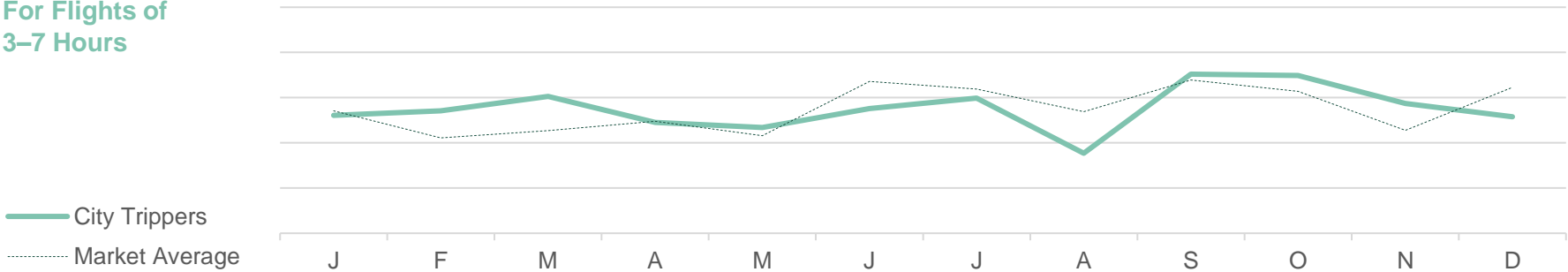
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **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](#)

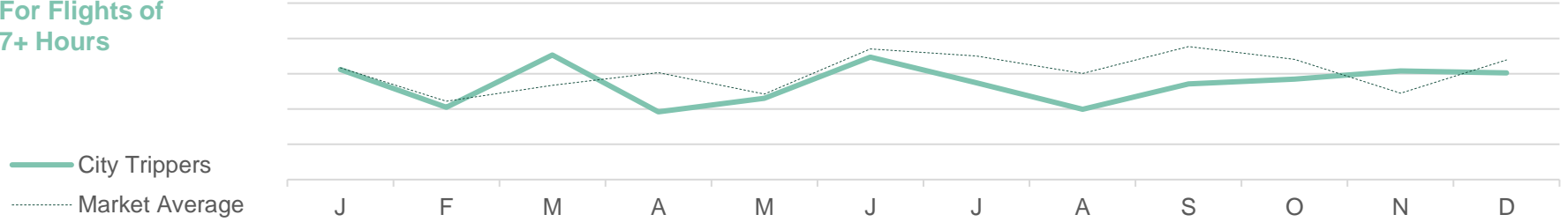


## TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



## TRIP DURATION

INDEX

1-2 Days	34%	82
3-5 Days	19%	81
1 Week Holiday	10%	84
2 Weeks Holiday	6%	79
3 Weeks Or More	2%	67

Incidence is frequency of 2+ times per year



## TRIP TYPE

INDEX

Domestic Leisure	43%	113
International Leisure	7%	91
Business Trip	4%	80
Added Personal To Business	2%	82
Worked During Vacation	1%	81

Incidence is frequency of 2+ times per year



# CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	55%	139
Friend's or family's place	25%	96
Vacation Rental (e.g., Airbnb, Vrbo)	23%	107
Premium Hotel	23%	106
All-inclusive resort	9%	104
Cruise ship	9%	107



## THOUGHTS ON INDIGENOUS TRAVEL

35%

83 INDEX SCORE

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

11%

96 INDEX SCORE

Strong Interest In Indigenous Activities



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	72%	103
I really want to learn about the history of the destinations I visit	52%	70
I'm willing to put in the effort while travelling in order to see lesser-known places	46%	90
I like to explore places that are off the beaten path and less explored	34%	73
I'm open to travelling to destinations with limited tourist infrastructure	30%	71
I'm open to visiting destinations with challenging climates or weather conditions	28%	91





# CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

- Our travel groups are generally adults only including our partner and friends, we also take solo trips.
- Our budgets are generally focussed on value and affordability.



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	53%	82
Adult relatives	25%	141
Solo	16%	98
Friends	15%	134
Kids	9%	90



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

\$2,900

81  
INDEX SCORE

### SPEND STYLE

Mid-range



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	51%	74
It's important to me that I visit somewhere that is open to diversity	42%	93
I consider the impact that I personally have on the destinations I visit	36%	76
Hearing from underrepresented communities is an important part of travelling	23%	79
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	17%	75

25%

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



### TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Shopping	61%	139
○ Outdoor markets	40%	137
○ Visiting famous shopping centres or areas	40%	141
○ Souvenir shopping	27%	139
 Local cuisine	55%	112
○ Local restaurants	50%	121
○ Street cuisine	34%	119
 Cultural experiences or attractions	53%	102
○ Visiting local monuments	31%	107
○ Museums	32%	92
 Festivals and events	43%	133
○ Music concerts or festivals	31%	144
○ Sporting events	14%	143
 Nightlife	36%	148
○ Bars and pubs	28%	146
○ Clubs and dancing	19%	146
 Family-focused attractions	37%	104
 Nature experiences	34%	66
 Guided tours	29%	102
 Overnight experiences	23%	94
 Health and wellness	17%	109
 Casual sports	11%	91
 Water-based sports	8%	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	74%	117	71%	131
To escape from routine	46%	108	53%	137
To spend time with family	36%	94	43%	100
For adventure and excitement	32%	104	33%	106
To have fun with friends	29%	139	20%	117
For a romantic getaway	16%	112	17%	141
To check off dream travel places	16%	100	22%	89
To have memories from top travel spots	10%	92	5%	77
To learn through other cultures	12%	75	18%	71



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	47%	98	44%	89
Visiting friends / family	54%	145	41%	106
Family / friends wanted to go	41%	136	33%	110
Special event (e.g., wedding, reunion)	37%	142	28%	117
Festival or event	23%	118	28%	124
Kids wanted to go	9%	91	13%	96

14% 90  
INDEX SCORE

Travel aligns with  
children’s school schedule

25% 97  
INDEX SCORE

Take time off for vacation  
during major holidays

17% 96  
INDEX SCORE

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



# CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- We are planners, typically thinking about trips a few months in advance

61%

Primary Trip Planner

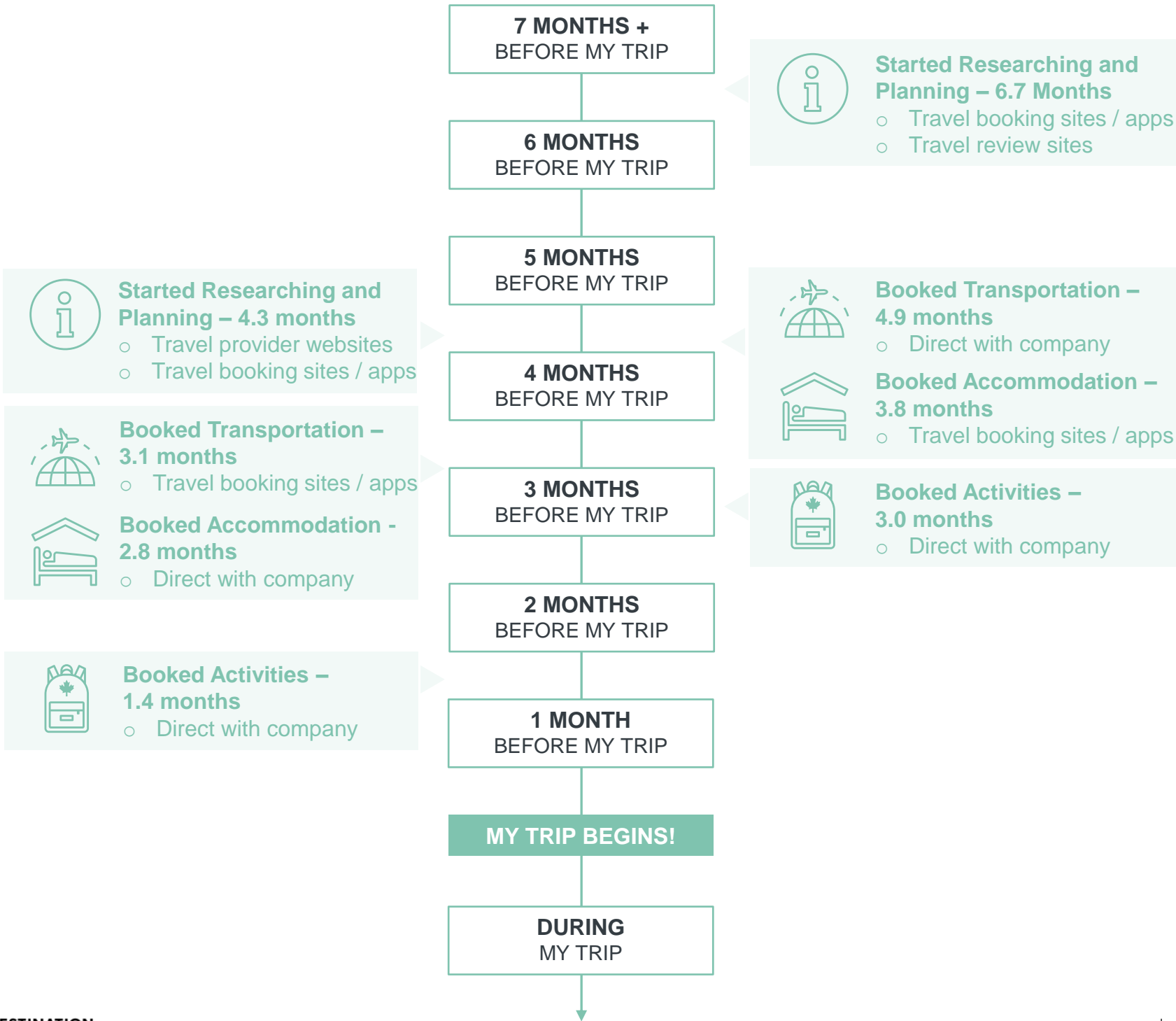
85  
INDEX SCORE

**!** **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





# CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Most of our trips are focussed on fun and spending time together.
- We also take trips like Simplicity Lovers.

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

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



TRIP TYPE	Friends Trip		
DESTINATION TYPE	Beach resort		29%
	Urban centre		17%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		36%
	Oceanside beaches		29%
	Outdoor markets		23%
KEY BEHAVIOURS	Destination choice driven by friends, planned in advance, easy travel		



TRIP TYPE	Urban Centre		
COMPANIONS	Alone		31%
	Couple only		30%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		41%
	Visiting famous shopping centres		37%
	Bars and pubs		29%
KEY BEHAVIOURS	City trip with higher budget, experiencing nightlife, focused on fun and indulgence		



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		46%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		41%
	Visiting famous shopping centres		19%
	Nature walks		15%
KEY BEHAVIOURS	Safe and reliable couples getaway to visit friends in their small city		



TRIP TYPE	Beach Resort		
COMPANIONS	Couple only		50%
	Extended family		20%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		45%
	Oceanside beaches		25%
	Outdoor markets		20%
KEY BEHAVIOURS	All-inclusive trip or vacation rental stay to unwind with partner and extended family		



## OUR BEHAVIOURS – WHERE WE GO



- We seek trendy locations with ease of travel, where festivals, famous attractions, and nightlife are abundant.
- Our travel spans Australia, New Zealand, Asia, and Europe.



	SCORE	INDEX		SCORE	INDEX
Australia	59%	105	Greece	3%	140
New Zealand	5%	116	Indonesia	3%	75
USA	4%	123	Italy	3%	114
Japan	4%	107	France	3%	100
UK	4%	117	Thailand	2%	110



## A word cloud featuring various travel-related terms. The words are arranged in a dense, overlapping manner. The most prominent words, shown in larger fonts, include 'JAPAN', 'AMERICA', 'BALI', 'ISLAND', 'SOUTH KOREA', 'EUROPE', 'VIETNAM', 'NEW ZEALAND', 'PERTH', 'AUSTRALIA', 'CANADA', 'ITALY', 'BEACH', 'CRUISE', and 'EUROPE'. Other visible words include 'PARIS', 'SOUTH AMERICA', 'LONDON', 'THAILAND', 'MALDIVES', 'LAHORE', 'MALTA', 'TASMANIA', 'EXMOUTH', 'HAWAII', 'SEOUL', 'INDONESIA', 'GREECE', 'AFRICA', 'EGYPT', 'AMSTERDAM', 'DUBAI', 'NORTHERN TERRITORY', 'TOKYO', 'BROOME AND THE KIMBERLEYS', 'ULURU', 'TAIWAN', 'NEW YORK', 'SPAIN', 'QUEENSLAND', 'SINGAPORE', 'MAURITIUS', 'SYDNEY', 'MEDITERRANEAN', 'ICELAND', 'CAIRNS', 'UNITED KINGDOM', 'FLORIDA', 'ISTANBUL', and 'MALTA'. The word 'CANADA' is the only one in the cloud that is colored red, while all other words are in various shades of green.



	SCORE	INDEX
Is not too expensive	66%	122
Is easy to travel around once there	60%	126
Renowned for food and drink experiences	34%	123
Language is not a barrier	31%	120
Has famous attractions	30%	122
Has vibrant nightlife and entertainment	20%	137
Provides a variety of local festivals and events	17%	111
Is a trendy destination	11%	137





# CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- We haven't really travelled to Canada and are unlikely to travel in the next few years.
- Top provinces visited are British Columbia, Ontario and Quebec.
- Future trip interests may be Niagara Falls and Vancouver.

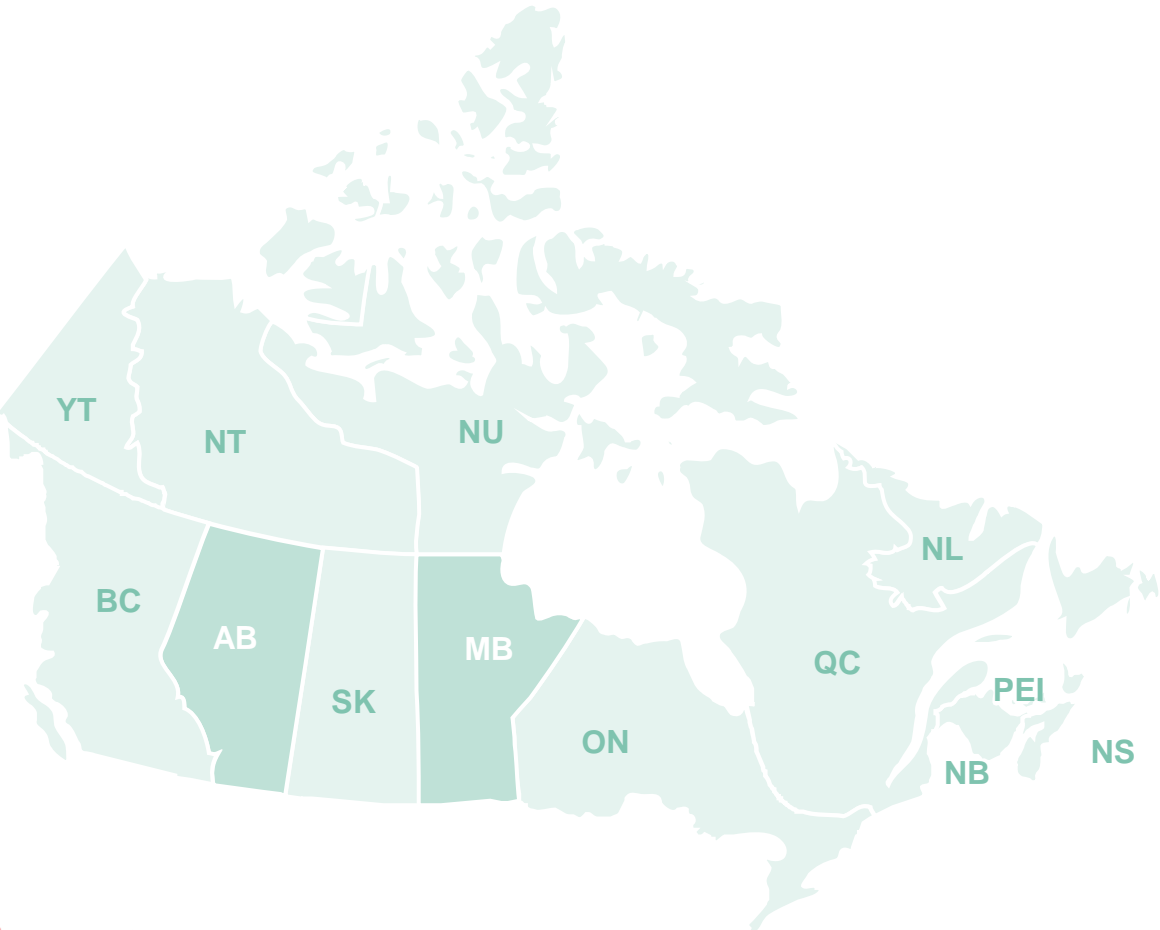


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	35%	122
BC	51%	97
MB	7%	116
NB	3%	84
NL	0%	67
NS	9%	85
NT	0%	64
NU	0%	70
ON	39%	108
PEI	2%	78
QC	24%	92
SK	6%	100
YT	2%	72



# CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- When we have visited Canada we have travelled in the summer months.
- We don't really know too much about what Canada has to offer.



## CANADA TRAVEL MONTHS ON A PAST TRIP

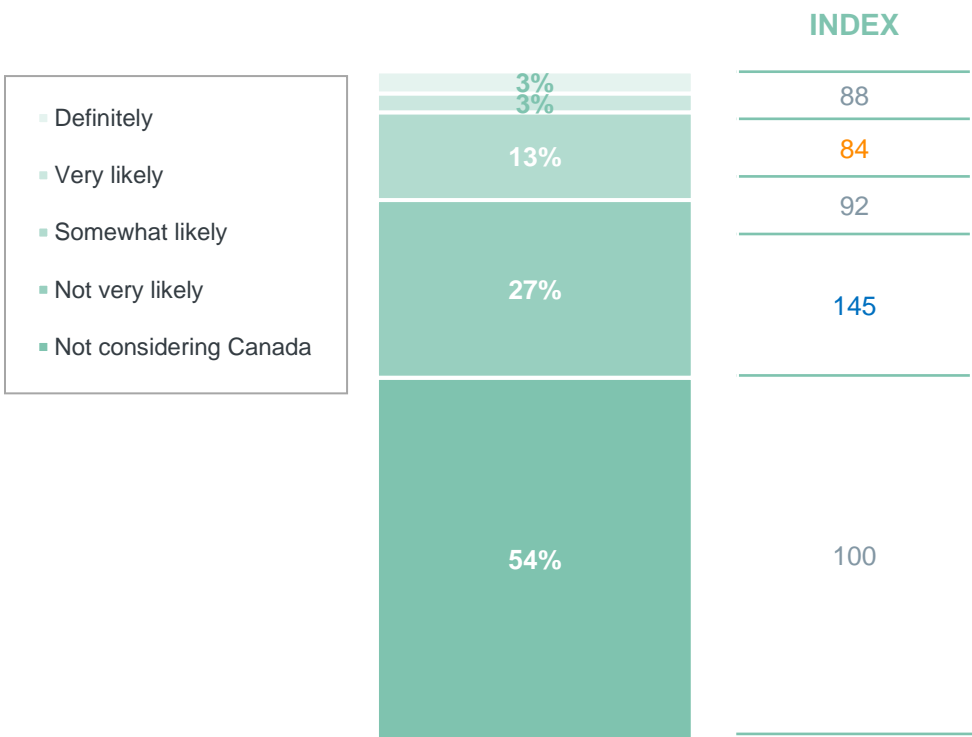
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	18%	32%	49%	20%
VS. TOTAL MARKET	22%	28%	42%	25%

5%

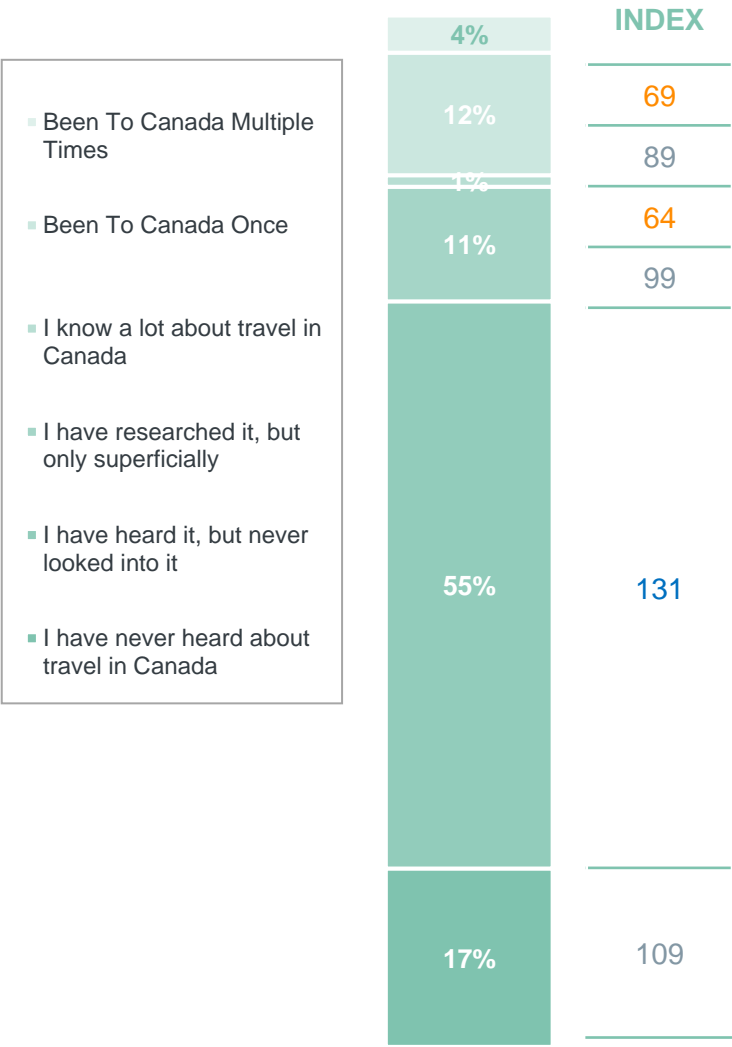
Been to Canada in last 5 years  
77 INDEX SCORE



## LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



## FAMILIARITY WITH CANADA





# CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

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



### MAJOR LIFE EVENTS IN LAST 5 YEARS

5%

Had a child  
93 INDEX SCORE

41%

Started a new job / career  
126 INDEX SCORE

13%

Bought a new home  
74 INDEX SCORE

18%

Moved to a new city  
131 INDEX SCORE

3%

Child started school  
91 INDEX SCORE

34%

Purchased a car  
83 INDEX SCORE

7%

Retired  
103 INDEX SCORE

17%

Renovated house  
89 INDEX SCORE



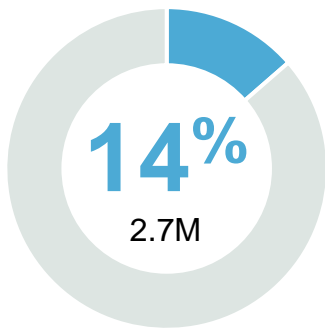
### NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	58%	89
Savings and investments	45%	74
Experiences (e.g., concerts, events).	43%	141
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	41%	90
Personal care and wellness	39%	109
Fashion and accessories	30%	140



# SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



## % OF AUSTRALIA POPULATION

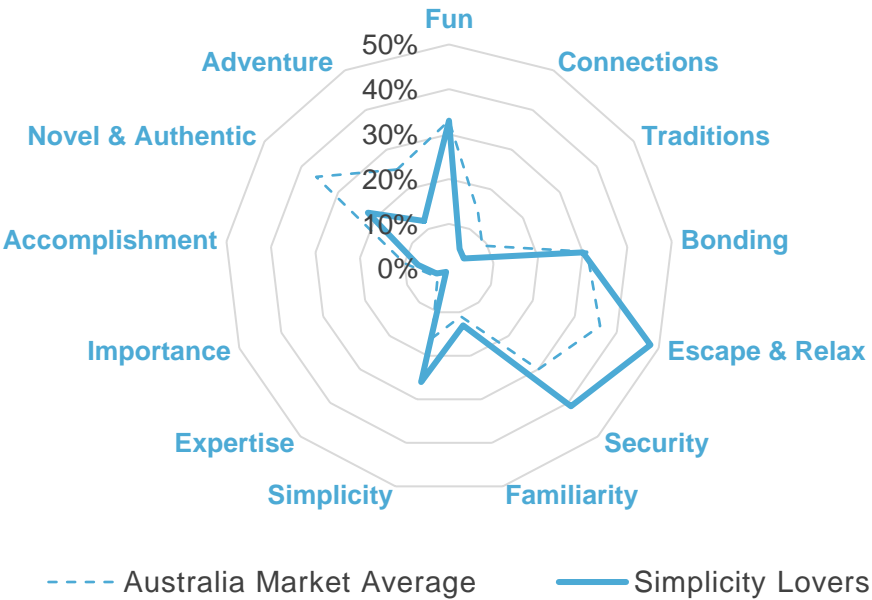
We seek peace, relaxation, and familiarity in our journeys, preferring easy and affordable destinations with a small-town feel. Prioritizing dining and nature experiences, we value simplicity and serenity.

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 or communication in a new language once we arrive.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

75

#### How is this calculated?

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



### TRAVELLER ECONOMIC INDEX

68

#### How is this calculated?

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



# SIMPLICITY LOVERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

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



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Quiet, relaxed experiences are how I take care of myself on vacation	91%	142
I'm not influenced by social media content when it comes to travel	85%	151
I generally don't try to learn local languages	78%	140
I travel when I need to	71%	147
I generally don't participate in physical activities during my holidays	70%	140
While travelling I generally stick to places that are direct and convenient to get to	66%	131
I generally don't think much on the impact that I personally have on the destinations I visit	65%	124
I generally prefer to go back to the same destinations on holiday	57%	145
I seek out destinations that offer quiet opportunities for deep self-reflection	55%	133
When travelling I often go to familiar restaurants, stores, and hotels that I recognize from home	51%	138
It's not important to me that I come back from travels having learnt something new	46%	131
I don't consider travel to be an important milestone of growing up	41%	152
You can get to know a country without experiencing its culture	39%	132



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel safe and secure	57%	140
To escape the demands of everyday life	55%	131
To find much-needed time to relax	53%	128
To enjoy simple, straightforward travel	42%	150
To be familiar with my surroundings	15%	124
To feel confident travel with no surprises	13%	148



## DESIRED DESTINATION

	SCORE	INDEX
Relaxed	80%	138
Safe	74%	127
Peaceful	67%	150
Reliable	44%	144
Practical	25%	151
Familiar	24%	143



# SIMPLICITY LOVERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We are generally aged 55+, likely retired.
- Our monthly incomes are lower due to retirement, but our overall net worth is more comfortable.
- Find us in the Inner and Outer regions of Australia.



### AGE

	SCORE	INDEX
18-34	12%	55
35-54	21%	79
55+	67%	134
MEAN YEARS	59.1	139



### HH INCOME (CAD)

	SCORE	INDEX
\$35K or less	26%	122
>\$35K to \$105K	64%	78
More than \$105K	6%	77
Refused	5%	119



### EMPLOYMENT

	SCORE	INDEX
Employed FT	26%	54
Employed PT	13%	79
Self-employed	6%	106
Retired	42%	134



### EDUCATION

	SCORE	INDEX
Primary education or less	1%	100
Secondary education	32%	132
Post-secondary education	68%	66



**60%**  
76 Have a valid passport



### GENDER

**50%** 108 Male

**49%** 93 Female

**0%** 95 Non-binary / Other



### HOUSEHOLD

**11%** 85 Children <18 Living At Home\*

**13%** 130 Children 18+ Living At Home\*

**49%** 135 Children NOT Living At Home\*

**40%** 97 No Children

\* Option is not exclusive



### AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	29%	66
Victoria	23%	72
Queensland	22%	116
Western Australia	11%	118

	SCORE	INDEX
South Australia	10%	140
Tasmania	3%	116
Australian Capital Territory	2%	108





# SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS



## TRAVEL TRADE INDEX: NON-GROUP

82

## TRAVEL TRADE INDEX: GROUP

71

**KEY** terminology on this page

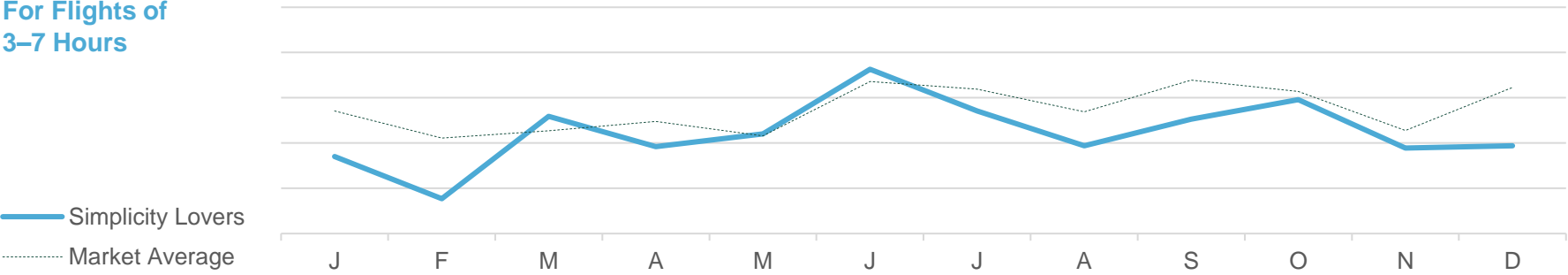
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **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](#)

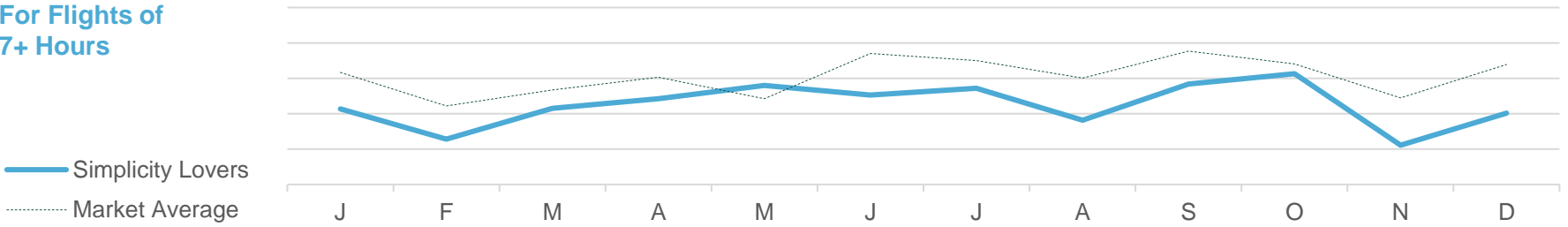


### TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



### TRIP DURATION

INDEX

1-2 Days	32%	66
3-5 Days	16%	69
1 Week Holiday	9%	77
2 Weeks Holiday	7%	88
3 Weeks Or More	4%	89

Incidence is frequency of 2+ times per year



### TRIP TYPE

INDEX

Domestic Leisure	41%	88
International Leisure	5%	78
Business Trip	2%	72
Added Personal To Business	1%	74
Worked During Vacation	0%	74

Incidence is frequency of 2+ times per year



# SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	48%	103
Friend's or family's place	37%	142
Vacation Rental (e.g., Airbnb, Vrbo)	16%	62
Premium Hotel	15%	80
Campsite	13%	104
Cruise ship	11%	116



## THOUGHTS ON INDIGENOUS TRAVEL

27%

71 INDEX SCORE

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

6%

73 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%	68
I really want to learn about the history of the destinations I visit	58%	81
I'm open to travelling to destinations with limited tourist infrastructure	42%	94
I like to explore places that are off the beaten path and less explored	41%	83
I'm willing to put in the effort while travelling in order to see lesser-known places	34%	69
I'm open to visiting destinations with challenging climates or weather conditions	18%	70



# 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	64%	109
Adult relatives	22%	114
Solo	16%	97
Friends	8%	92
Kids	8%	89



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

\$2,650

73  
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	58%	97
I consider the impact that I personally have on the destinations I visit	35%	76
It's important to me that I visit somewhere that is open to diversity	25%	68
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	21%	82
Hearing from underrepresented communities is an important part of travelling	19%	73

26%

## 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.”



# SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES















## OVERALL INSIGHT

- Our activities are low-impact and include sightseeing in nature, dining and shopping.
- We like to get outside for walks and appreciate beaches and lakes.



## TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Nature experiences	55%	105
○ Oceanside beaches	30%	103
○ Nature walks	25%	89
○ See or explore lakes, rivers, or waterfalls	25%	98
 Casual sports	13%	103
○ Fishing	8%	122
○ Casual biking	3%	95
 Local cuisine	44%	89
○ Local restaurants	37%	91
○ Cafes or bakeries	29%	96
 Cultural experiences or attractions	40%	75
○ Museums	28%	78
○ Visiting local monuments	21%	74
 Shopping	36%	92
○ Outdoor markets	23%	91
○ Visiting famous shopping centres or areas	18%	85
 Overnight experiences	22%	83
 Family-focused attractions	23%	91
 Guided tours	21%	80
 Festivals and events	15%	68
 Health and wellness	10%	61
 Water-based sports	8%	81
 Nightlife	6%	82



# 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	87%	144	76%	144
To escape from routine	63%	150	50%	128
To spend time with family	51%	113	43%	100
To have fun with friends	17%	90	22%	128
To check off dream travel places	9%	73	18%	76
To seek solitude and isolation	11%	115	11%	126
For a romantic getaway	10%	86	11%	111
For adventure and excitement	10%	59	10%	59
For personal reflection and growth	11%	93	10%	90



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	53%	108	58%	117
Visiting friends / family	42%	103	47%	134
Special event (e.g., wedding, reunion)	18%	66	26%	109
Family / friends wanted to go	25%	70	24%	89
Festival or event	8%	60	17%	91
Kids wanted to go	6%	87	14%	97

9%

85  
INDEX SCORE

Travel aligns with  
children’s school schedule

12%

69  
INDEX SCORE

Take time off for vacation  
during major holidays

14%

80  
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.

60%

Primary Trip Planner

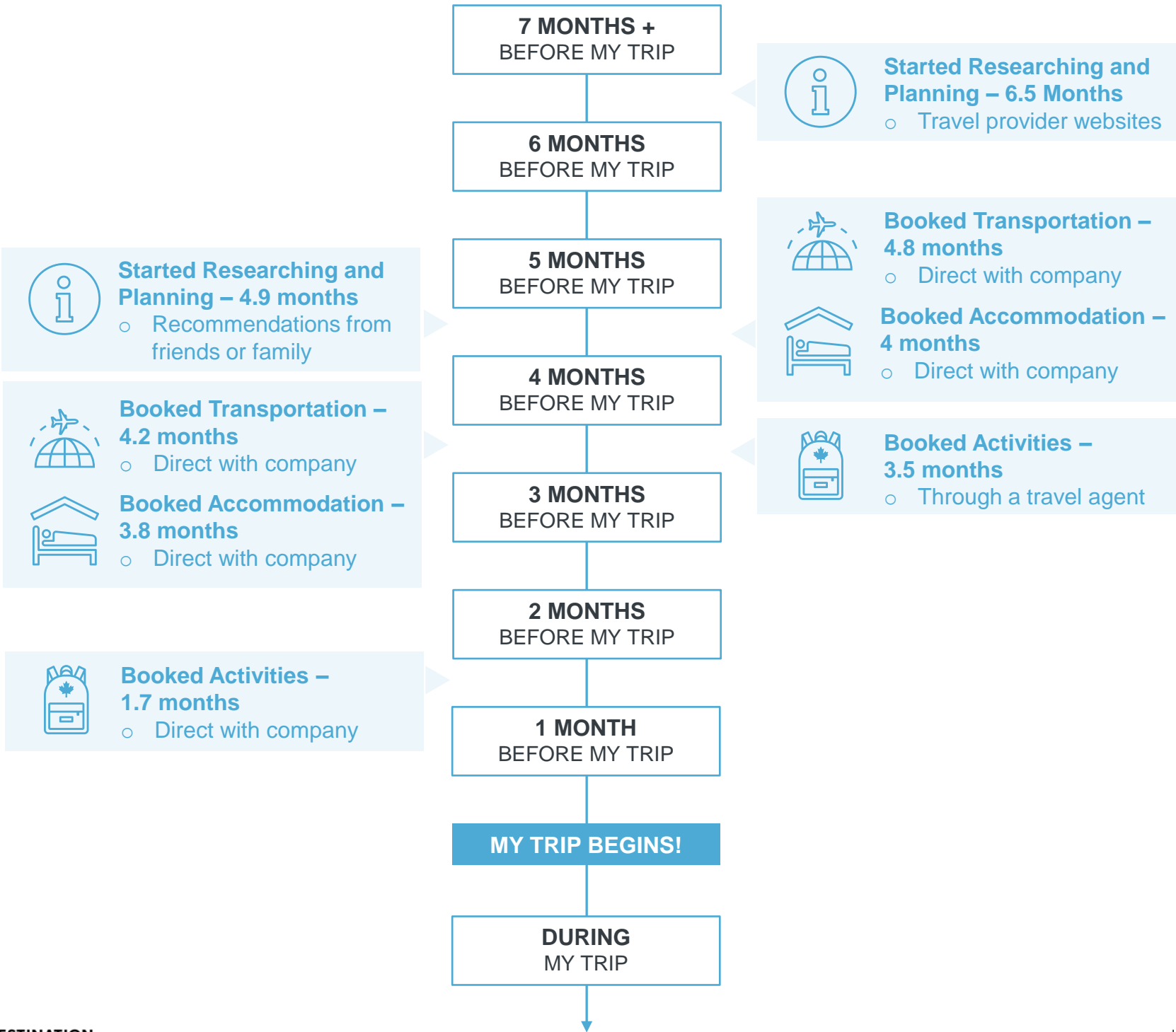
84  
INDEX SCORE

! **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





# SIMPLICITY LOVERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

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

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

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



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		46%
	Extended family		23%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		41%
	Cafes or bakeries		38%
	Visiting famous shopping centres		19%
KEY BEHAVIOURS	Likely visiting friends, which provides accommodation and decides the destination		



TRIP TYPE	Beach Resort		
COMPANIONS	Couple only		50%
	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		45%
	Oceanside beaches		25%
	Outdoor markets		20%
KEY BEHAVIOURS	Seeking mild climate to relax. Moderate budget, staying in a hotel or all-inclusive resort		



TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		19%
	Small cities and town		19%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Security
ACTIVITIES	Local restaurants		40%
	Cafes or bakeries		31%
	Nature walks		17%
KEY BEHAVIOURS	Couples only is focussed more on exploration, could be a cruise or easy camping		



TRIP TYPE	Urban Centre		
COMPANIONS	Alone		31%
	Extended family		22%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		41%
	Visiting famous shopping centres		37%
	Bars and pubs		29%
KEY BEHAVIOURS	Trip to visit friends in familiar city, dine out, and have fun		





## OUR BEHAVIOURS – WHERE WE GO



- Our preferred destinations are affordable, accessible, not too crowded, and have pleasant weather.
- We take shorter trips, mostly domestic within Australia and New Zealand a little closer to home. We travel internationally every few years.



	SCORE	INDEX		SCORE	INDEX
Australia	72%	132	Japan	2%	62
New Zealand	4%	72	Fiji	2%	104
Indonesia	4%	106	USA	2%	66
UK	3%	102	Malaysia	2%	107
Thailand	2%	106	Singapore	2%	82



A word cloud of travel-related terms. The most prominent words are 'AUSTRALIA', 'TASMANIA', 'CANADA', 'NEW ZEALAND', 'ROAD TRIP', 'TROPICAL', 'BALI', 'AUSTRALIA', 'ENGLAND', 'LOCAL', 'RESORT', 'BEACH', 'JAPAN', 'CRUISE', and 'EUROPE'. Other visible words include 'MALDIVES', 'HAWAII', 'NORTHERN LIGHTS', 'GOLD COAST', 'PERTH', 'KIMBERLEYS', 'SYDNEY', 'SINGAPORE', 'QUEENSLAND', 'MOUNTAINS', 'UNITED STATES', 'PACIFIC ISLAND', 'CAIRNS', 'ALASKA', 'VIETNAM', 'HONG KONG', 'FAR NORTH QUEENSLAND', 'DISNEY', 'ADELAIDE', 'DARWIN', 'ICELAND', 'NATIONAL PARKS', 'SOUTH AFRICA', 'FIJI', 'MEXICO', 'BRIGHT, VICTORIA', 'THAILAND', 'SUNSHINE COAST', 'IRELAND', 'CENTRAL NEW SOUTH WALES', 'AS VEGAS', 'PORT DOUGLAS', 'THE COONAWARRA', and 'MELBOURNE'.



	SCORE	INDEX
Is not too expensive	74%	134
Is easy to travel to	65%	139
Is easy to travel around once there	62%	130
Isn't too crowded	62%	143
Has a mild and pleasant climate	45%	142
Provides a sense of personal safety	42%	131
Doesn't take too long to get there	38%	140
Language is not a barrier	37%	137



# 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 common tourist destinations in British Columbia, Alberta and Ontario.
- A future trip could include the Rockies or other Western destination.

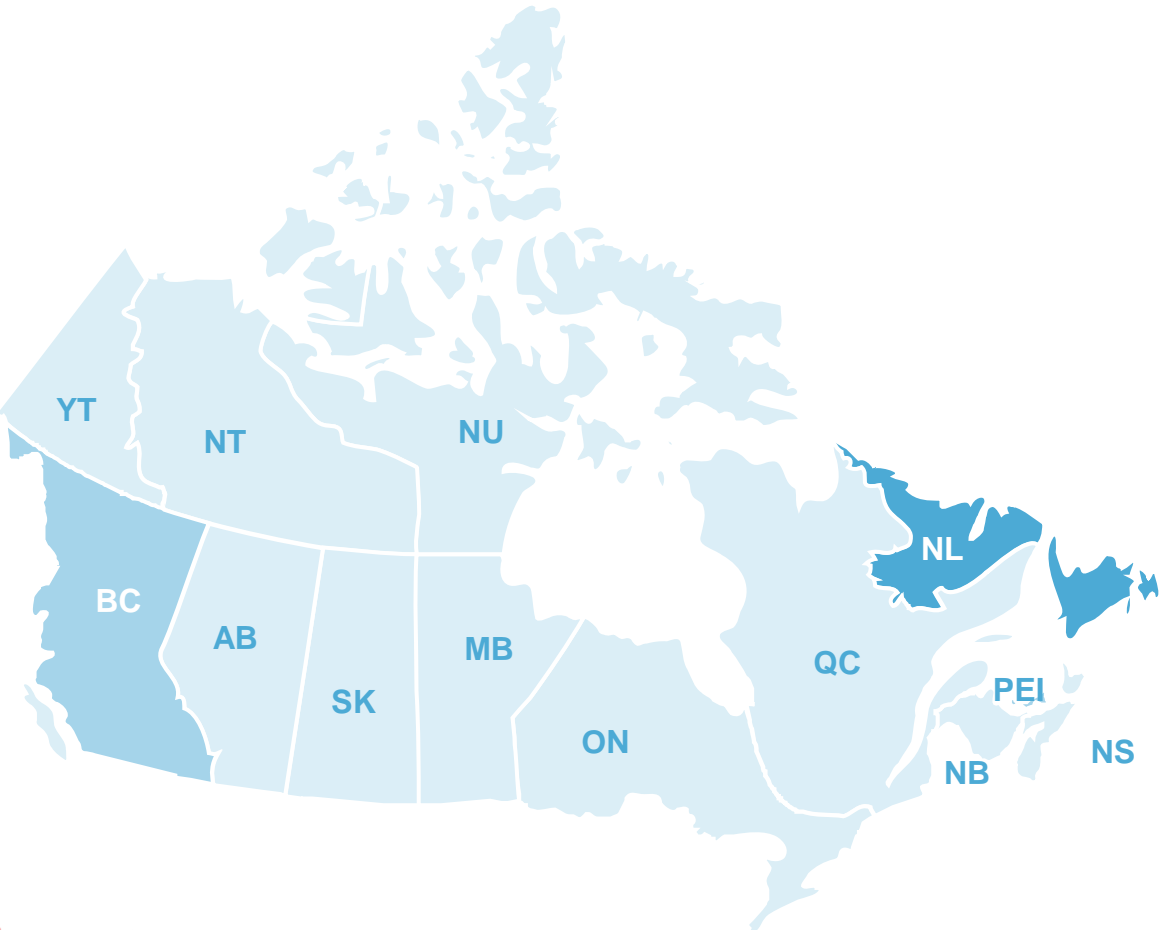


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	31%	103
BC	62%	124
MB	4%	90
NB	1%	78
NL	10%	127
NS	10%	91
NT	2%	81
NU	0%	70
ON	32%	78
PEI	5%	93
QC	26%	96
SK	3%	83
YT	8%	110



# 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.



## CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	14%	30%	44%	24%
VS. TOTAL MARKET	22%	28%	42%	25%

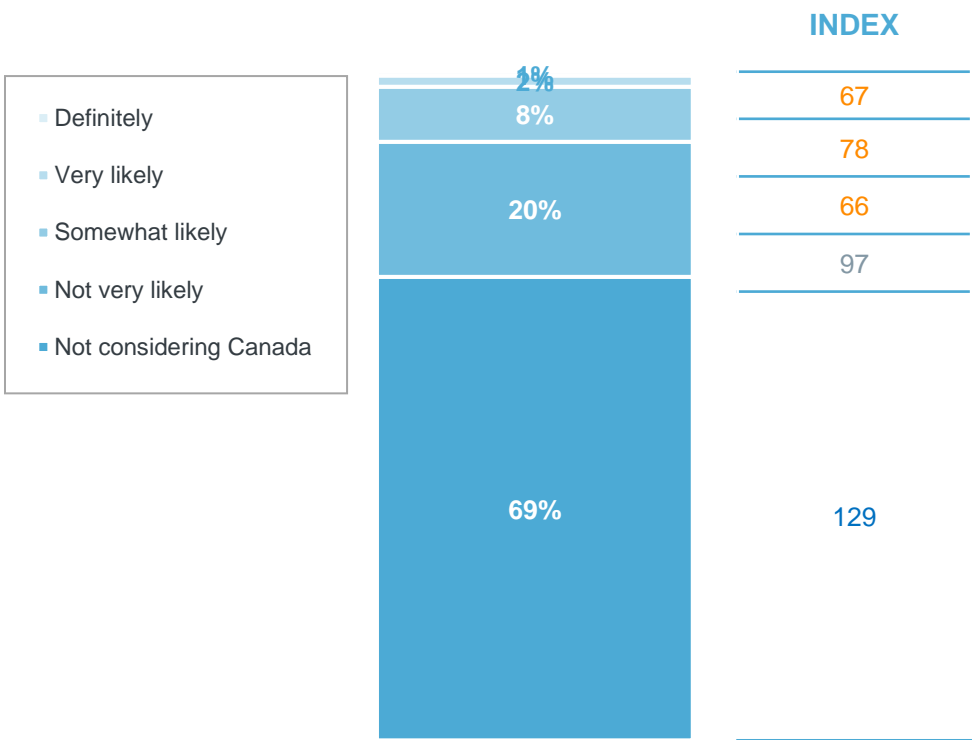
6%

Been to Canada in last 5 years

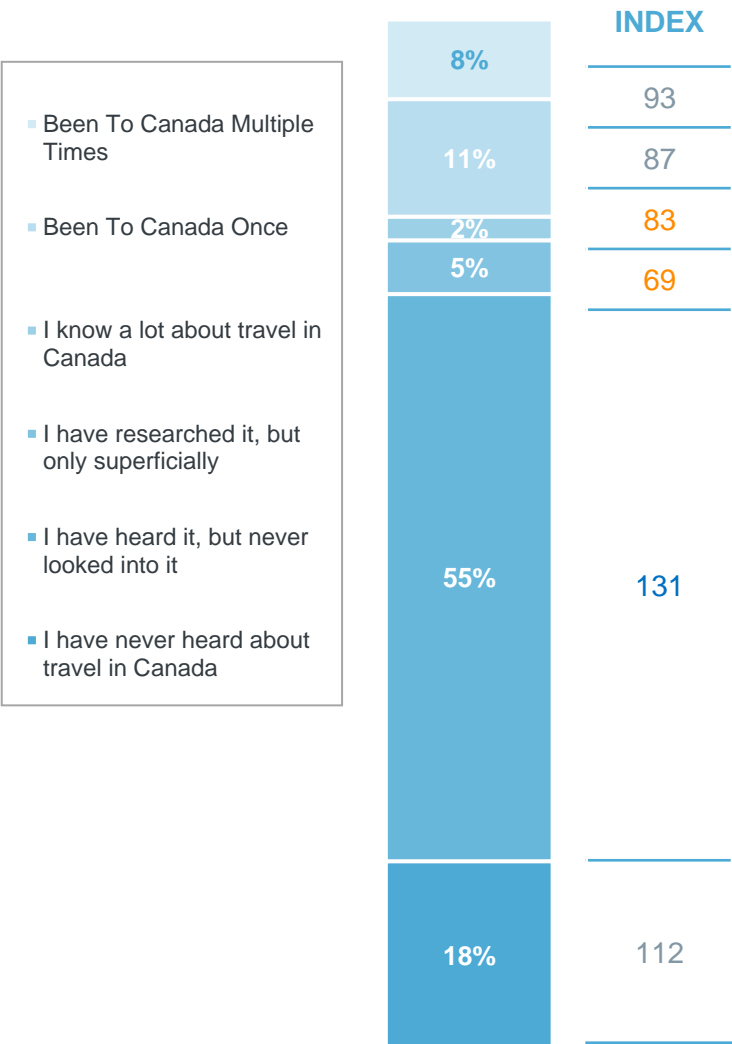
81 INDEX SCORE



## 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’re prioritizing our spending on our hobbies, continuing to build our savings, and investing in our home.



### MAJOR LIFE EVENTS IN LAST 5 YEARS

2%

Had a child  
88 INDEX SCORE

19%

Started a new job / career  
59 INDEX SCORE

14%

Bought a new home  
79 INDEX SCORE

10%

Moved to a new city  
62 INDEX SCORE

1%

Child started school  
87 INDEX SCORE

28%

Purchased a car  
59 INDEX SCORE

11%

Retired  
126 INDEX SCORE

13%

Renovated house  
60 INDEX SCORE



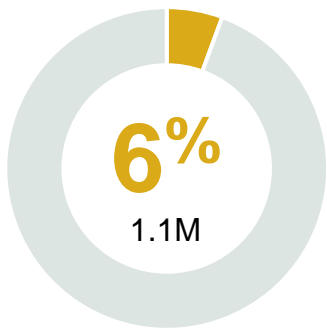
### NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	61%	98
Savings and investments	54%	138
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	47%	114
Personal care and wellness	39%	109
Home and decor	27%	124
Experiences (e.g., concerts, events).	20%	56



# FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



## % OF AUSTRALIA 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

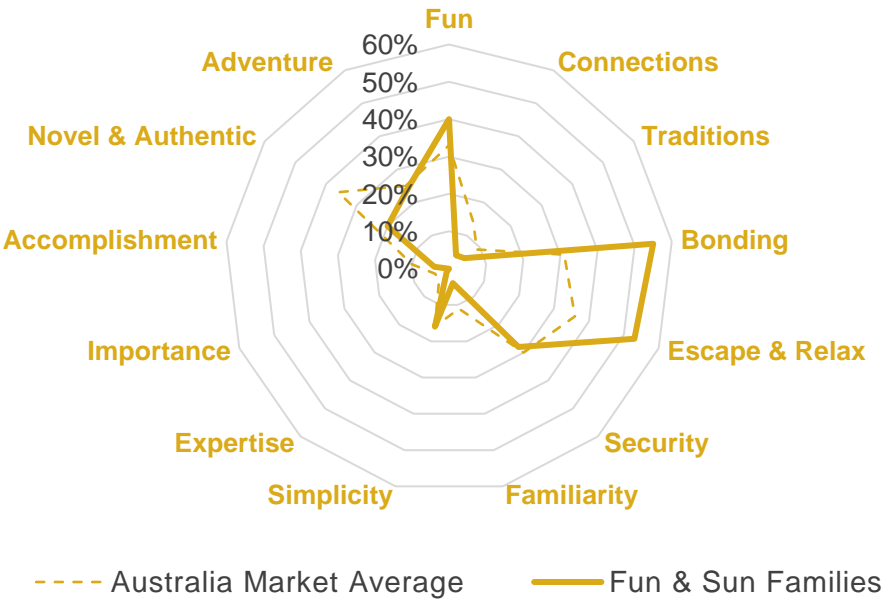
We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences. We want to get straight to family-fun.
- 2

Our trips are escapes from everyday life, focusing on creating lasting memories through fun and simple activities.
- 3

We plan our annual 1-week vacation a few months in advance, relying on booking and review sites / apps, social media and recommendations.
- 4

While we mostly travel within Australia and New Zealand, we dream of locations within East Asia and Pacific.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

72

#### How is this calculated?

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



### TRAVELLER ECONOMIC INDEX

73

#### How is this calculated?

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



# FUN & SUN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

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



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer planning my trips independently and don't consult travel agencies	86%	138
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	84%	127
I generally avoid places that are challenging or difficult to reach	77%	130
I tend to choose a destination to visit based off value for money	75%	144
I appreciate diversity but not likely engage deeply with Indigenous cultures	73%	129
I generally stick to the most popular areas when I visit somewhere	66%	127
While travelling I generally stick to places that are direct and convenient to get to	64%	128
I will generally not go out of my way to buy local when travelling	55%	145
I am not more likely to select destinations / activities that invest in socially responsible tourism	55%	131
It's not important to me that I come back from travels having learnt something new	48%	136
I'm more interested in the present and don't focus much on the history of where I visit	47%	128
I generally prefer to go back to the same destinations on holiday	43%	120
You can get to know a country without experiencing its culture	39%	130



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	65%	122
To share quality time with others	62%	142
To escape the demands of everyday life	58%	139
To find much-needed time to relax	57%	135
To bond through shared experiences	49%	155
To let loose and forget about day-to-day life	39%	142



## DESIRED DESTINATION

	SCORE	INDEX
Friendly	84%	144
Relaxed	76%	132
Safe	74%	127
Fun	66%	135
Carefree	25%	137
Familiar	18%	119



# FUN & SUN FAMILIES

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We likely have more than one child, spanning a range of ages.
- We are more likely to be female.
- Find us in major cities in New South Wales & ACT, and Victoria.



### AGE

	SCORE	INDEX
18-34	30%	103
35-54	63%	144
55+	6%	66
MEAN YEARS	40.8	75



### HH INCOME (CAD)

	SCORE	INDEX
\$35K or less	18%	86
>\$35K to \$105K	70%	131
More than \$105K	7%	88
Refused	5%	131



### EMPLOYMENT

	SCORE	INDEX
Employed FT	44%	107
Employed PT	23%	134
Self-employed	6%	110
Retired	3%	65



### EDUCATION

	SCORE	INDEX
Primary education or less	0%	80
Secondary education	26%	110
Post-secondary education	74%	92



53%

60 Have a valid passport



### GENDER

31%

51 Male

69%

149 Female

0%

86 Non-binary / Other



### HOUSEHOLD

95%

146 Children <18 Living At Home\*

11%

107 Children 18+ Living At Home\*

1%

63 Children NOT Living At Home\*

4%

54 No Children

\* Option is not exclusive



### AUSTRALIA STATE BREAKOUT

	SCORE	INDEX
New South Wales	35%	116
Victoria	32%	143
Queensland	15%	74
Western Australia	9%	84

	SCORE	INDEX
South Australia	7%	94
Tasmania	1%	76
Australian Capital Territory	1%	90





# FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS



## TRAVEL TRADE INDEX: NON-GROUP

63

## TRAVEL TRADE INDEX: GROUP

69

**KEY** terminology on this page

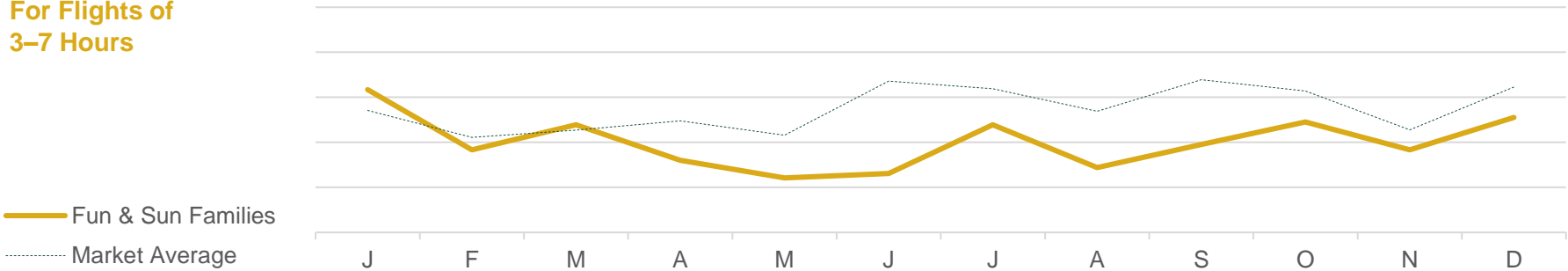
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).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

For additional definitions see [Glossary](#)

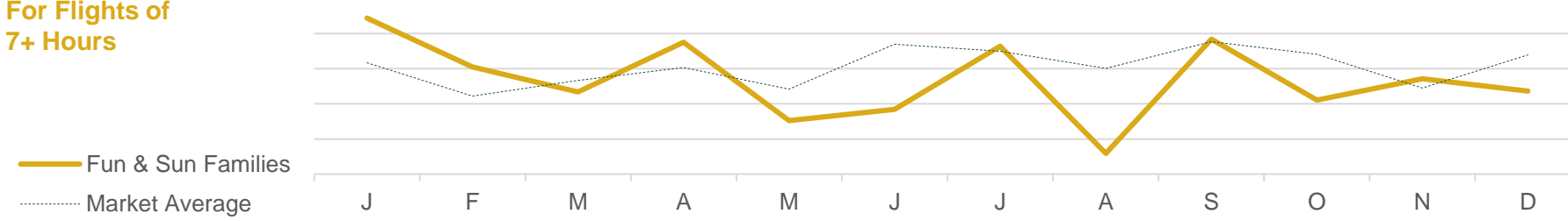


### TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



### TRIP DURATION

INDEX

1-2 Days	37%	100
3-5 Days	19%	82
1 Week Holiday	6%	59
2 Weeks Holiday	3%	53
3 Weeks Or More	1%	63

Incidence is frequency of 2+ times per year



### TRIP TYPE

INDEX

Domestic Leisure	43%	111
International Leisure	2%	58
Business Trip	3%	75
Added Personal To Business	1%	77
Worked During Vacation	1%	77

Incidence is frequency of 2+ times per year



# FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	53%	127
Campsite	26%	146
Friend's or family's place	24%	93
Vacation Rental (e.g., Airbnb, Vrbo)	24%	110
Premium Hotel	17%	88
Budget Hotel	10%	89



## THOUGHTS ON INDIGENOUS TRAVEL

27%

71 INDEX SCORE

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

3%

63 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%	70
I really want to learn about the history of the destinations I visit	53%	72
I'm willing to put in the effort while travelling in order to see lesser-known places	36%	72
I like to explore places that are off the beaten path and less explored	34%	73
I'm open to travelling to destinations with limited tourist infrastructure	33%	77
I'm open to visiting destinations with challenging climates or weather conditions	20%	73



# FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

- Most of our trips include our immediate family, and sometimes include extended family.
- We keep budgets conservative.



## TRAVEL COMPANIONS

	SCORE	INDEX
Kids	83%	150
Spouse / Partner	76%	135
Adult relatives	22%	118
Friends	5%	72
Solo	2%	56



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

\$2,760

77  
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	45%	55
I consider the impact that I personally have on the destinations I visit	40%	83
It's important to me that I visit somewhere that is open to diversity	39%	88
Hearing from underrepresented communities is an important part of travelling	19%	73
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	16%	73

23%

PRIORITIZE  
SUSTAINABLE  
TRAVEL

72 INDEX SCORE

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

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



# FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES



## OVERALL INSIGHT

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



## TOP DESIRED TRAVEL ACTIVITIES

		SCORE	INDEX
	Family-focused attractions	86%	152
	○ Zoos or aquariums	69%	152
	○ Amusement parks or theme parks	59%	148
	○ Space or science centres	26%	142
	Shopping	54%	126
	○ Outdoor markets	38%	131
	○ Visiting famous shopping centres or areas	35%	128
	Water-based sports	23%	130
	○ Swimming	18%	137
	○ Kayaking, canoeing, or paddle-boarding	12%	129
	Nature experiences	44%	85
	○ Oceanside beaches	31%	106
	○ Camping	13%	107
	Local cuisine	38%	77
	○ Local restaurants	33%	80
	○ Cafes or bakeries	29%	98
	Cultural experiences or attractions	39%	71
	Festivals and events	26%	94
	Overnight experiences	18%	57
	Guided tours	17%	71
	Casual sports	15%	122
	Health and wellness	13%	76
	Nightlife	6%	80



# 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	86%	158	93%	157
To relax and unwind	73%	116	65%	114
To escape from routine	35%	81	46%	119
For adventure and excitement	44%	130	15%	68
To have fun with friends	23%	113	21%	122
To check off dream travel places	5%	59	9%	44
For a romantic getaway	2%	52	3%	64
To have memories from top travel spots	5%	63	21%	134
To be pampered	13%	121	2%	66



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	64%	155	73%	157
Partner / spouse wanted to go	73%	146	75%	151
Visiting friends / family	43%	108	40%	104
Family / friends wanted to go	39%	127	43%	133
Special event (e.g., wedding, reunion)	24%	90	18%	77
Festival or event	24%	123	5%	52

57% 139  
INDEX SCORE

Travel aligns with  
children’s school schedule

36% 120  
INDEX SCORE

Take time off for vacation  
during major holidays

26% 145  
INDEX SCORE

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



# FUN & SUN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- We plan our annual holiday a few months in advance, getting our transportation and accommodation secured.

57%

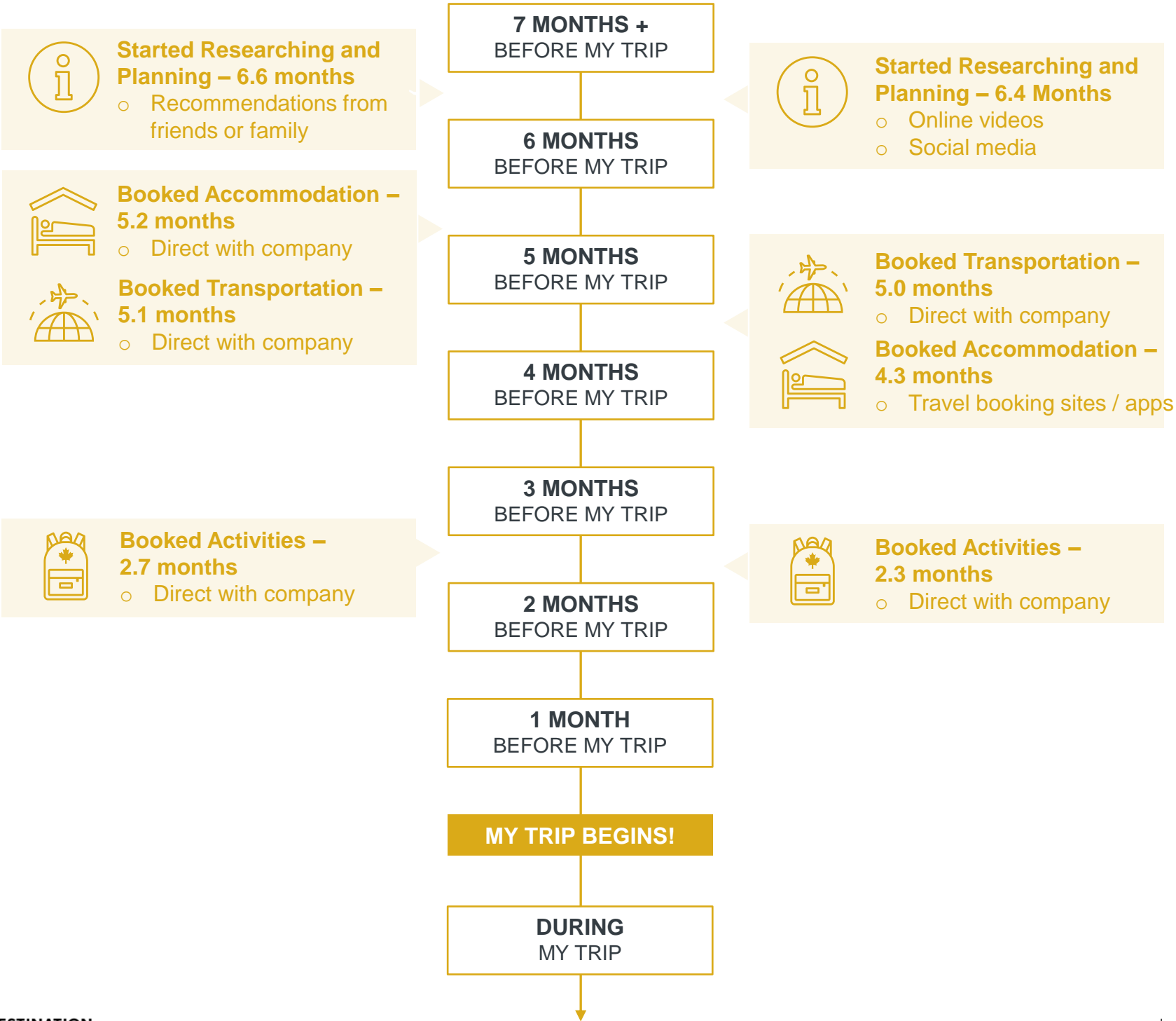
Primary Trip Planner

72 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






# 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 City Trippers 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

**24%** 157 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		65%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Amusement parks or theme parks		36%
	Local restaurants		30%
	Swimming		19%
KEY BEHAVIOURS	Fun beach destination, camping or all-inclusive		

% OF TOTAL TRIPS

**21%** 148 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Nuclear family with kids		70%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Nature walks		23%
	Zoos or aquariums		23%
	Amusement parks or theme parks		18%
KEY BEHAVIOURS	All about kids, famous attractions, vacation rental or could be camping		

% OF TOTAL TRIPS

**15%** 128 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only		30%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Escape & Relax
ACTIVITIES	Local restaurants		41%
	Visiting famous shopping centres		37%
	Bars and pubs		29%
KEY BEHAVIOURS	Couples trip to relax. Spending a little more, dining and experiencing nightlife		

% OF TOTAL TRIPS

**9%** 108 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Suburban Experience		
COMPANIONS	Couple only		43%
TRIP EMOTIONAL MOTIVATIONS	Security	Bonding	Fun
ACTIVITIES	Local restaurants		32%
	Visiting famous shopping centres		27%
	Cafes or bakeries		19%
KEY BEHAVIOURS	Easy and affordable getaway to relax with friends at their home		





# FUN & SUN FAMILIES

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

- Our preferred destinations are kid-friendly, easy to access, and offer packages to make our lives easier.
- Most of our travel is within Australia and New Zealand, a little closer to home.



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Australia	77%	142	India	2%	105
New Zealand	4%	56	Fiji	1%	77
Indonesia	3%	51	Singapore	1%	66
Japan	3%	81	Philippines	1%	108
USA	2%	79	UK	1%	54



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	86%	144
Is not too expensive	63%	119
Is easy to travel to	53%	122
Is easy to travel around once there	48%	106
Good connectivity (Wi-Fi, cell service, etc.)	32%	133
Doesn't take too long to get there	28%	120
Has packaged holiday / vacation offers	22%	150
Offers all-inclusive resort packages	13%	115



# FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- We likely haven't been to Canada before, although we have heard about a few travel destinations and experiences.
- For those of us who have visited, it was likely to Alberta or British Columbia.



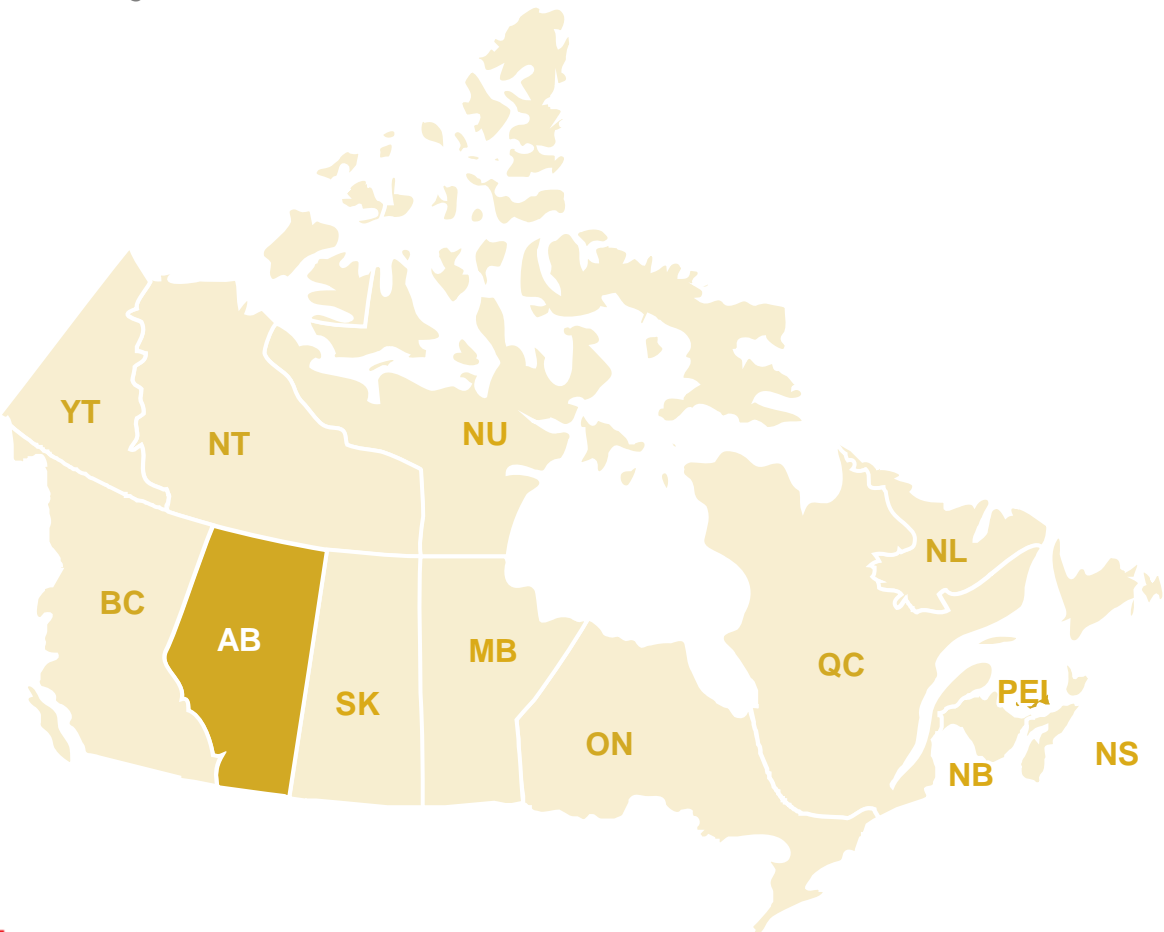
## WHERE DO WE WANT TO GO IN CANADA

MONTREAL  
NIAGARA FALLS  
SURREY



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	44%	160
BC	32%	49
MB	0%	66
NB	0%	74
NL	0%	67
NS	7%	75
NT	5%	113
NU	0%	70
ON	22%	43
PEI	14%	141
QC	0%	36
SK	0%	60
YT	0%	60



# FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- When we have visited Canada, we have travelled in the winter months.
- Generally, we are not planning a future visit.



## CANADA TRAVEL MONTHS ON A PAST TRIP

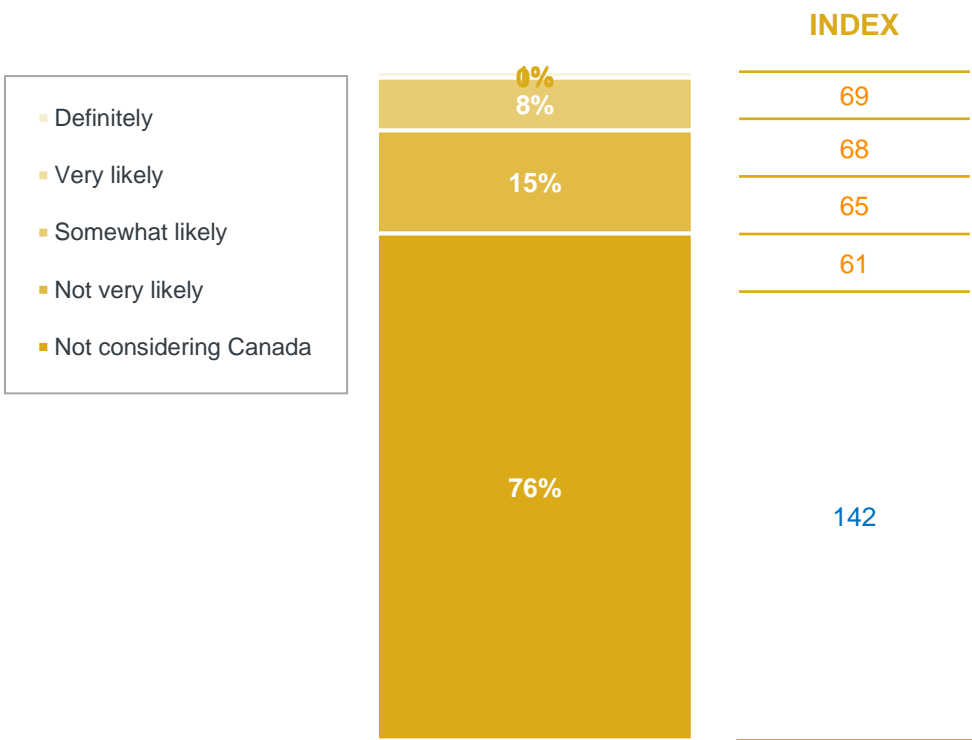
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	56%	9%	26%	8%
VS. TOTAL MARKET	22%	28%	42%	25%

1%

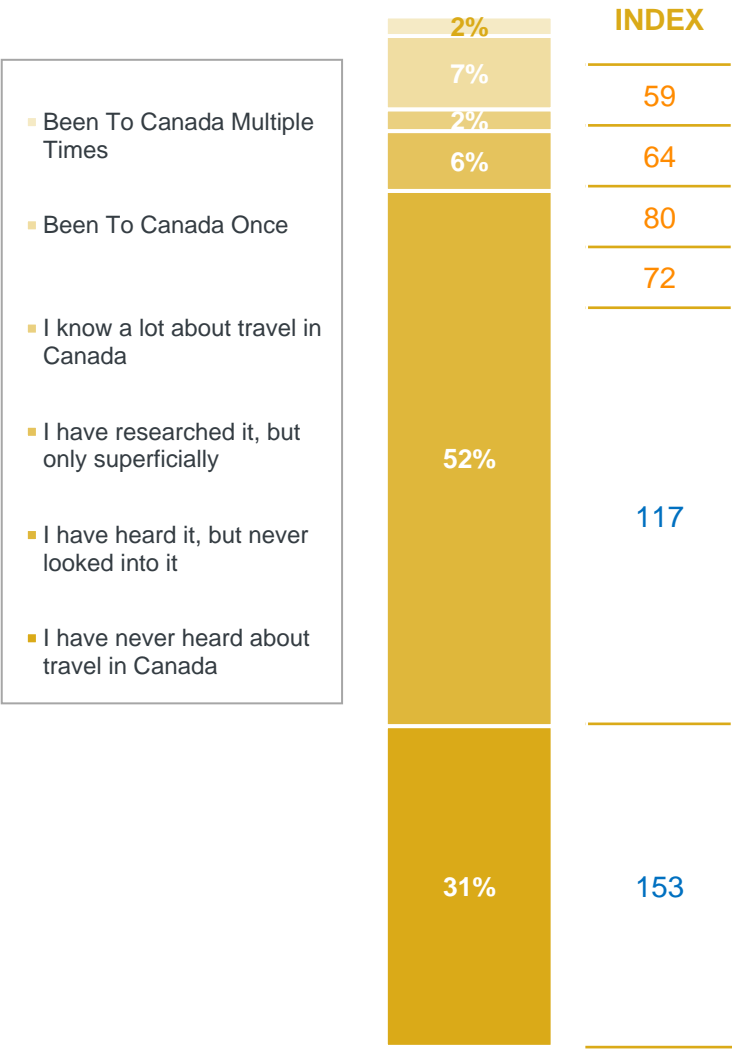
Been to Canada in last 5 years  
60 INDEX SCORE



## 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

38%

Had a child

155 INDEX SCORE

36%

Started a new job / career

111 INDEX SCORE

23%

Bought a new home

143 INDEX SCORE

13%

Moved to a new city

86 INDEX SCORE

36%

Child started school

154 INDEX SCORE

47%

Purchased a car

135 INDEX SCORE

1%

Retired

64 INDEX SCORE

17%

Renovated house

90 INDEX SCORE



### NON-ESSENTIAL SPENDING PRIORITIES

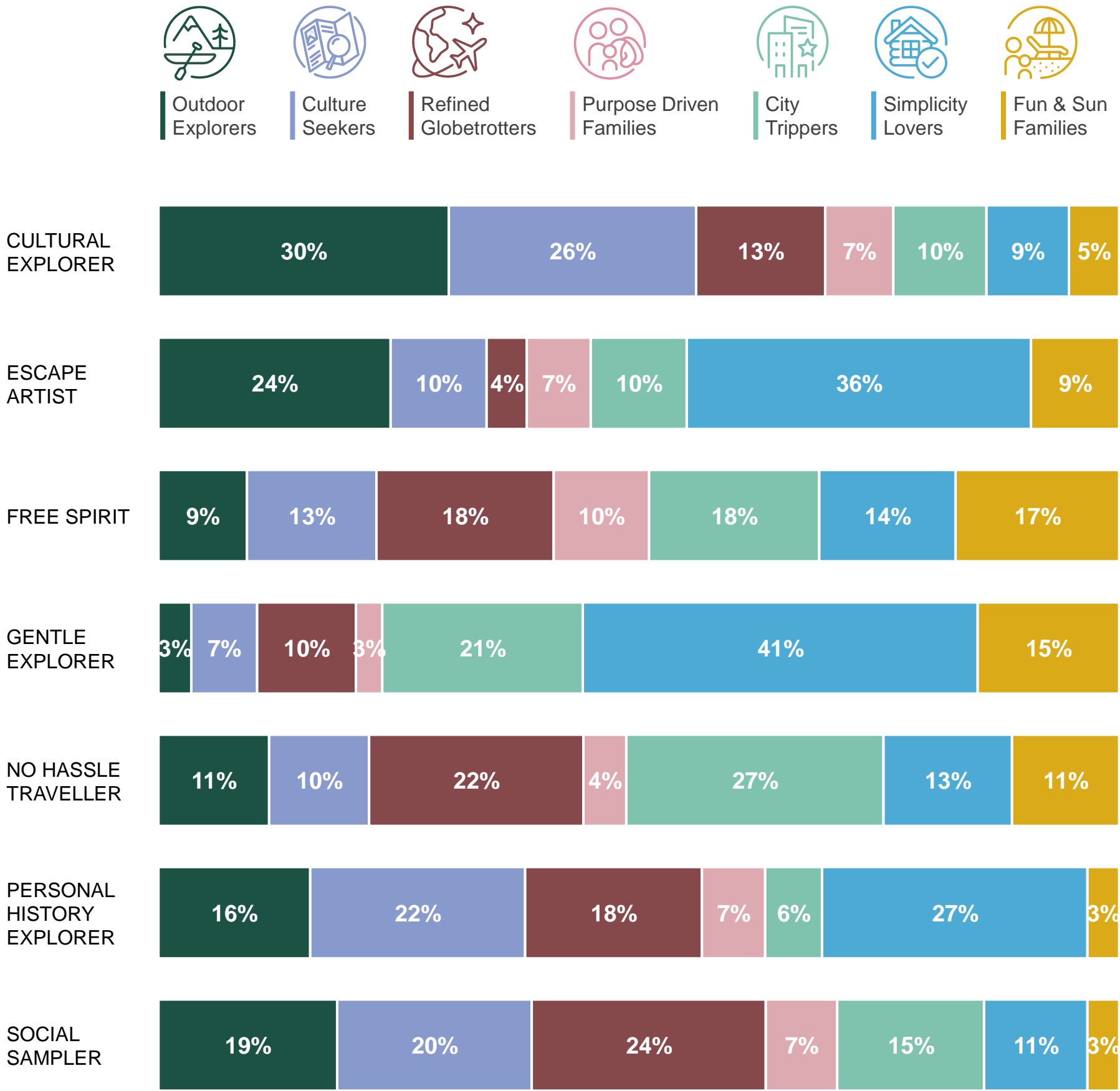
	SCORE	INDEX
Savings and investments	52%	119
Travel	46%	54
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	42%	95
Personal care and wellness	41%	125
Experiences (e.g., concerts, events).	31%	96
Home and decor	29%	134



# 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

<b>DESIRED DESTINATION</b>	How a traveller describes the personality of an ideal destination.	
<b>DESTINATION CANADA PRIORITY SEGMENT</b>	Traveller 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 maximize their impact.	
<b>EMOTIONAL TRAVEL MOTIVATIONS</b>	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	
<b>EMOTIONAL TRAVEL MOTIVATION: ACCOMPLISHMENT</b>	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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• To feel like I've accomplished something.</li> <li>• To push my limits and challenge myself.</li> </ul>
<b>EMOTIONAL TRAVEL MOTIVATION: ADVENTURE</b>	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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• To have experiences I am proud to tell others about.</li> <li>• To feel a sense of adventure.</li> </ul>
<b>EMOTIONAL TRAVEL MOTIVATION: BONDING</b>	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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• To share quality time with others.</li> <li>• To bond and create lasting memories through shared experiences.</li> </ul>
<b>EMOTIONAL TRAVEL MOTIVATION: CONNECTIONS</b>	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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• To feel connected with new people.</li> </ul>
<b>EMOTIONAL TRAVEL MOTIVATION: ESCAPE &amp; RELAX</b>	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.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• To escape the demands of everyday life.</li> <li>• To find much-needed time to relax.</li> <li>• To let loose and forget about day-to-day life.</li> </ul>



# GLOSSARY

## DETAILS AND DEFINITIONS

EMOTIONAL TRAVEL MOTIVATION: <b>EXPERTISE</b>	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	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> <li>• To feel like a travel expert.</li> </ul>
EMOTIONAL TRAVEL MOTIVATION: <b>FAMILIARITY</b>	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.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> <li>• To be familiar with my surroundings.</li> <li>• To feel like a local.</li> </ul>
EMOTIONAL TRAVEL MOTIVATION: <b>FUN</b>	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.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> <li>• To just enjoy myself and have fun.</li> <li>• To indulge myself and live in the moment.</li> <li>• To have a fun, social setting.</li> </ul>
EMOTIONAL TRAVEL MOTIVATION: <b>IMPORTANCE</b>	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.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> <li>• To feel like I'm important.</li> </ul>
EMOTIONAL TRAVEL MOTIVATION: <b>NOVEL &amp; AUTHENTIC</b>	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 originality in their journeys, immersing themselves in different cultures and engaging in genuine and authentic interactions.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> <li>• To have authentic experiences.</li> <li>• To open my mind to new perspectives.</li> <li>• To explore and discover new things and places.</li> </ul>
EMOTIONAL TRAVEL MOTIVATION: <b>SECURITY</b>	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.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> <li>• To feel welcomed.</li> <li>• To feel safe and secure.</li> </ul>





# GLOSSARY

## DETAILS AND DEFINITIONS

EMOTIONAL TRAVEL MOTIVATION: <b>SIMPLICITY</b>	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.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> <li>• To enjoy the simplicity of easy, straightforward travel.</li> <li>• To feel confident of no surprises; I'll get exactly what I expected.</li> </ul>
EMOTIONAL TRAVEL MOTIVATION: <b>TRADITIONS</b>	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.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> <li>• To create new, or take part in old, traditions.</li> </ul>
<b>FUNCTIONAL BENEFITS</b>	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	
<b>NON-TRAVELLER</b>	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.	
<b>PRIMARY TRIP PLANNER</b>	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.	
<b>PRIORITIZE SUSTAINABLE TRAVEL</b>	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.	
<b>SEGMENT ALIGNMENT</b>	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	
<b>SHORT / MID / LONG HAUL</b>	Short Haul: Those who did not travel via flight or travelled on a less than 3 hours flight Mid Haul: Those who travelled on a 3 to 7 hours flight Long Haul: Those who travelled or 7+ hours flight	



# GLOSSARY

DETAILS AND DEFINITIONS



<b>TRAVELLER ECONOMIC INDEX</b>	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
<b>TRAVELLER RESPONSIBLE INDEX</b>	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, and diversity. To reduce market specific bias and any variation in score composition across markets, the score is reported as an index in the segment profiles
<b>TRAVEL TRADE INDEX – GROUP</b>	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
<b>TRAVEL TRADE INDEX – NON-GROUP</b>	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).