

JAPAN MARKET PROFILES

As one of Asia's most vibrant and culturally rich travel markets, Japanese travellers are drawn to destinations that offer a blend of escape and excitement.

Japanese travellers look to relax in destinations that are free-spirited and carefree which offer dynamic cultural scenes, where they can fully immerse themselves in the buzz and energy of local life while enjoying a much-needed break from their busy routines.



JAPAN



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

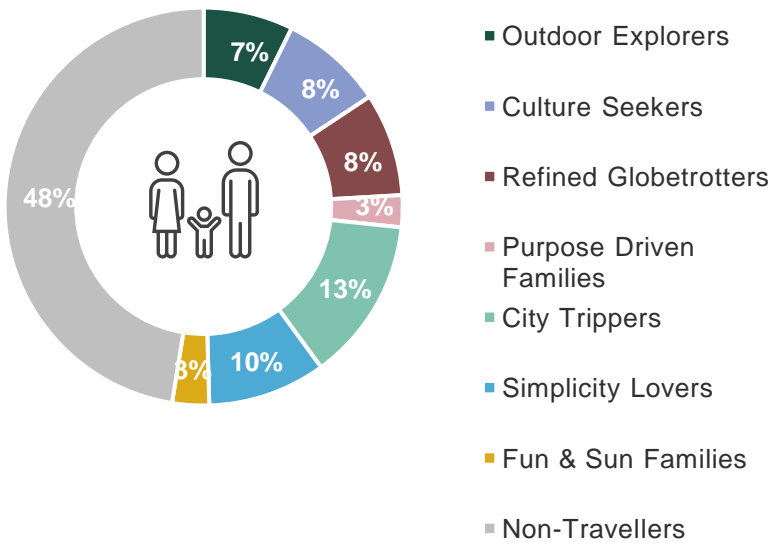
- Often visit urban centres, or remote destinations with access to nearby cities, which allows for exploration of famous shopping options and renowned culinary experiences.
- Overall preference for reliable, safe, and well-known destinations and interest in trendy locales.
- Interested in many distractions and activities, especially if they are trendy or bucket-list items. Whether active or low-impact, participating in activities is important.

The Japanese market overindexes for City Trippers and non-travellers. There is a general preference for destinations with developed infrastructure that offer luxury experiences, such as premium dining, high-end shopping, and opportunities for health and wellness.

Travellers from Japan value a mix of local cuisine, overnight experiences, and cultural attractions, seeking destinations that combine fun with a touch of elegance.

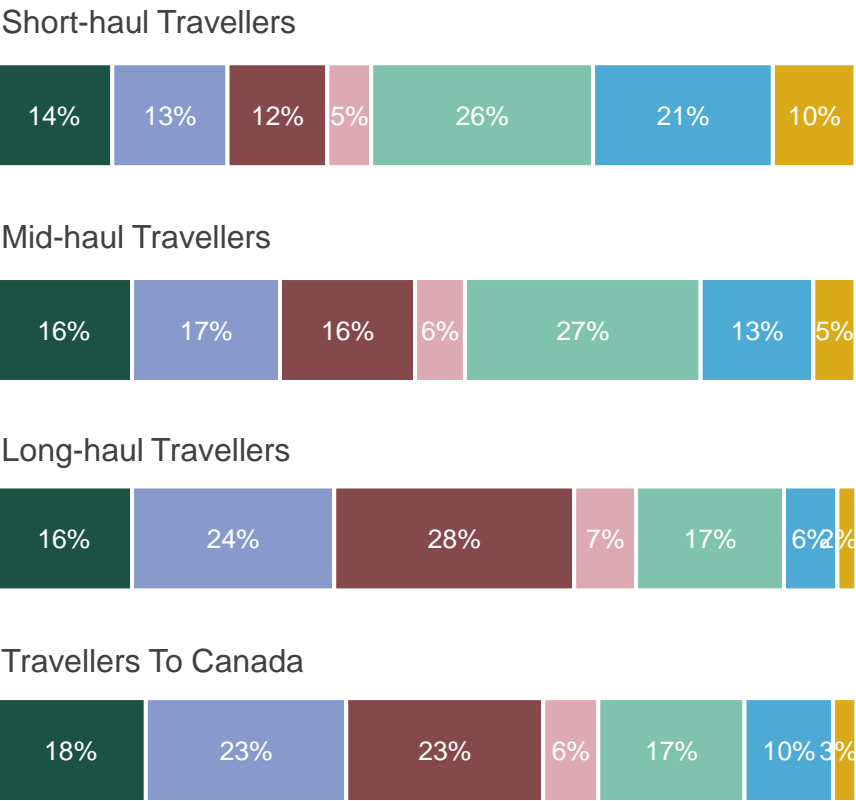
MARKET SIZING

POPULATION BREAKDOWN



47.4% of the adult population in Japan (est. 105M) are non-travellers (est. 49M). Reasons for not travelling are often financial or feeling uncomfortable due to health risks like Covid.


OUTBOUND TRAVELLERS' BREAKDOWN



- ! KEY** terminology on this page (for additional details and definitions see [Glossary](#))
- **SHORT / MID / LONG HAUL** – No-Flight or < 3 Hours Flight / 3–7 Hour Flight / 7+ Hours Flight
 - **NON-TRAVELLER** – Has not travelled a minimum of one night away in paid accommodation in past 5 years OR is not actively planning to travel in next 2 years.



MARKET SEGMENTS OVERVIEW

	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
 OUTDOOR EXPLORERS	7.8M	Yes	<ul style="list-style-type: none">○ Nature Experiences○ Overnight Experiences○ Winter Sports	<ul style="list-style-type: none">○ Novel & Authentic○ Adventure○ Expertise
 CULTURE SEEKERS	9.0M	No	<ul style="list-style-type: none">○ Cultural Experiences & Attractions○ Festivals & Events○ Cuisine	<ul style="list-style-type: none">○ Novel & Authentic○ Connections○ Traditions
 REFINED GLOBETROTTERS	8.9M	Yes	<ul style="list-style-type: none">○ Cuisine○ Cultural Experiences & Attractions○ Overnight Experiences	<ul style="list-style-type: none">○ Bonding○ Novel & Authentic○ Security
 PURPOSE DRIVEN FAMILIES	2.7M	No	<ul style="list-style-type: none">○ Cuisine○ Family-Focused Attractions○ Shopping	<ul style="list-style-type: none">○ Bonding○ Novel & Authentic○ Escape & Relax
 CITY TRIPPERS	13.7M	No	<ul style="list-style-type: none">○ Cuisine○ Shopping○ Cultural Experiences & Attractions	<ul style="list-style-type: none">○ Fun○ Escape & Relax○ Simplicity
 SIMPLICITY LOVERS	10.0M	No	<ul style="list-style-type: none">○ Cuisine○ Health & Wellness○ Cultural Experiences & Attractions	<ul style="list-style-type: none">○ Escape & Relax○ Simplicity○ Fun
 FUN & SUN FAMILIES	3.1M	No	<ul style="list-style-type: none">○ Family-Focused Attractions○ Shopping○ Cuisine	<ul style="list-style-type: none">○ Escape & Relax○ Fun○ Bonding

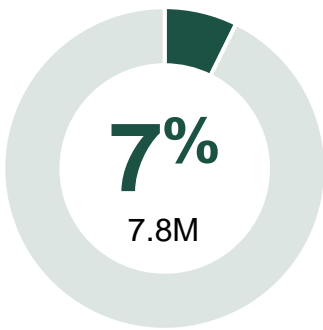
! KEY terminology on this page (for additional details and definitions see [Glossary](#))

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

WHAT YOU NEED TO KNOW ABOUT ME

- 1

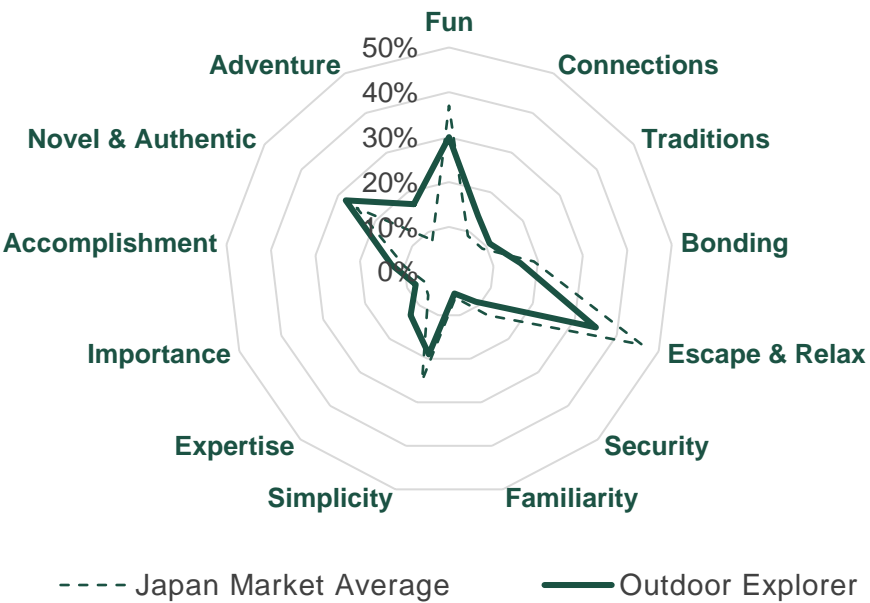
We love travel and take all types of trips (domestic / international / business / bleisure).
- 2

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

Activity and sports help us relax, and it is our version of self-care.
- 4

We like to get off the beaten path, open to exploring without an agenda and staying flexible.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

114

How is this calculated?

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



TRAVELLER ECONOMIC INDEX

104

How is this calculated?

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



OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



OVERALL INSIGHT

- We value outdoor experiences for how they make us feel, and are always on the lookout for new destinations.
- Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment.
- We prioritize adventurous, free-spirited, and unexplored destinations.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm always on the look out for new destinations to visit next	87%	110
I like my holiday to have some form of physical activity	73%	143
I generally think natural attractions are the highlights of my trip	71%	152
I go where I want to go, no matter the hurdles	62%	142
I prefer wandering around without a set agenda, even if that means missing some “famous” sites	59%	119
I learn the basics of a language before visiting a country / region	59%	120
I feel best on vacation when being highly active	51%	117
I'm open to unconventional accommodations when travelling	49%	135
I enjoy living in the moment while travelling and don't worry much about what comes next	47%	120
I prefer to explore quickly and cover as much ground as possible at historic sites or museums	47%	129
Local cuisine is not a priority for me; I focus on other aspects of travel	33%	141
I seek out destinations where I can explore my ancestral heritage	33%	131
I like to keep my travel plans flexible and often book on short notice	25%	141



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel a sense of adventure	28%	150
To have authentic experiences	24%	126
To feel connected with new people	14%	118
To feel like a travel expert	13%	142
To push my limits and challenge myself	7%	147
To be proud to share my travel experiences	6%	125



DESIRED DESTINATION

	SCORE	INDEX
Free-Spirited	46%	102
Open	30%	102
Adventurous	25%	155
Unexplored	20%	154
Passionate	14%	138
Sociable	7%	114



OUTDOOR EXPLORERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

- We represent a diverse age range, and most of us do not have children.
- We are working full-time earning a conservative income.
- We may also be self-employed.



AGE

	SCORE	INDEX
18-34	23%	114
35-54	31%	100
55+	46%	96
MEAN YEARS	51.4	94



HH INCOME (CAD)

	SCORE	INDEX
\$45K or less	21%	100
>\$45K to \$100K	66%	101
More than \$100K	10%	106
Refused	3%	74



EMPLOYMENT

	SCORE	INDEX
Employed FT	45%	111
Employed PT	11%	79
Self-employed / Business owner	10%	109
Retired	12%	96



EDUCATION

	SCORE	INDEX
Primary education or less	0%	77
Secondary education	22%	81
Post-secondary education	78%	123



73%
103 Have a valid passport



GENDER

55% 115 Male

45% 85 Female

0% 80 Non-binary / Other



HOUSEHOLD

18% 99 Children <18 Living At Home*

18% 98 Children 18+ Living At Home*

22% 95 Children NOT Living At Home*

60% 103 No Children

* Option is not exclusive



JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	16%	107
Kanagawa	10%	110
Osaka	9%	104
Saitama	6%	124
Hyogo	6%	136
Aichi	5%	81

	SCORE	INDEX
Chiba	5%	89
Fukuoka	4%	114
Shizuoka	3%	100
Hokkaido	3%	81
Kyoto	2%	94



OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

100

TRAVEL TRADE INDEX: **GROUP**

120

! KEY terminology on this page

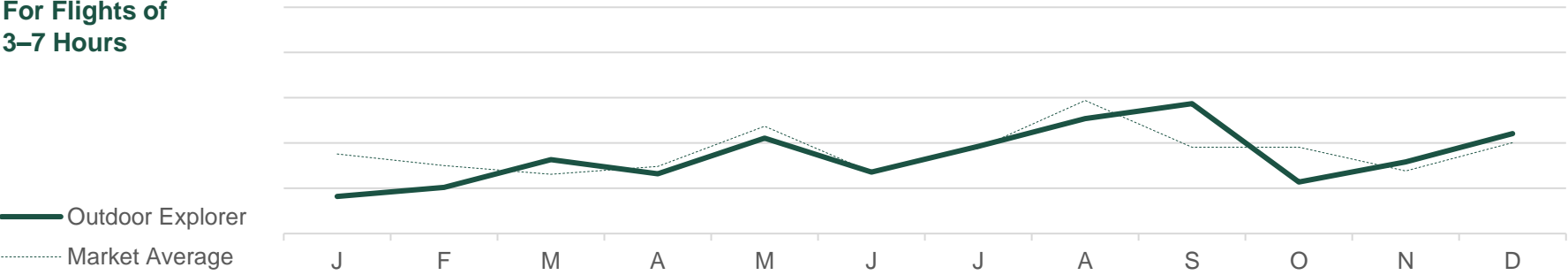
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).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

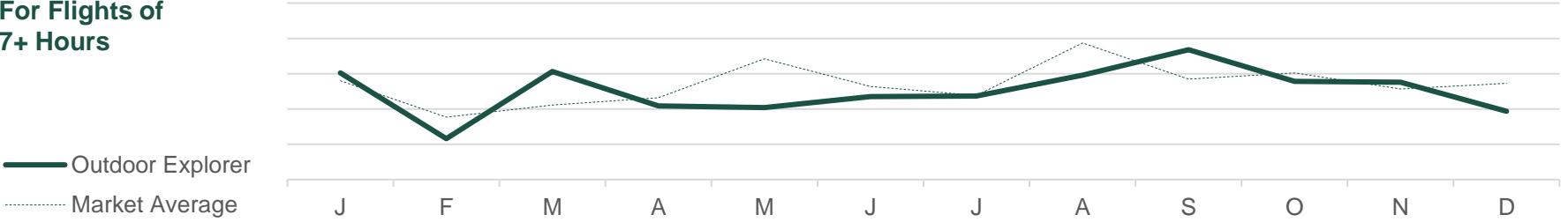


TYPICAL TRAVEL MONTHS

For Flights of
3–7 Hours



For Flights of
7+ Hours



TRIP DURATION

INDEX

1-2 Days	46%	109
3-5 Days	20%	112
1 Week Holiday	5%	123
2 Weeks Holiday	2%	111
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	49%	99
International Leisure	8%	113
Business Trip	9%	100
Added Personal To Business	6%	122
Worked During Vacation	2%	112

Incidence is frequency of 2+ times per year



OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	72%	85
Budget Hotel	28%	98
Premium Hotel	16%	90
Bed & Breakfast	10%	136
Friend's or family's place	6%	63
Campsite	5%	116



THOUGHTS ON INDIGENOUS TRAVEL

59%

126 INDEX SCORE

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

10%

113 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%	110
I'm willing to put in the effort while travelling in order to see lesser-known places	64%	140
I like to explore places that are off the beaten path and less explored	57%	148
I'm open to travelling to destinations with limited tourist infrastructure	50%	141
You only ever get to know a country by experiencing its culture	47%	105
I'm open to visiting destinations with challenging climates or weather conditions	42%	144



OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

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



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	53%	98
Solo	22%	110
Adult relatives	16%	71
Friends	11%	96
Kids	10%	96



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$1,660

98
INDEX SCORE

SPEND STYLE

Mid-range



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	54%	99
Hearing from underrepresented communities is an important part of travelling	47%	119
I consider the impact that I personally have on the destinations I visit	43%	114
It's important to me that I visit somewhere that is open to diversity	43%	98
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	42%	121

36%

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

- We seek the outdoors, adventuring in nature and exploring all types of sports.
- Overnight experiences offering exploration or retreats are also of interest.



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Nature experiences	60%	153
○ Nature walks	34%	148
○ See or explore lakes, rivers, or waterfalls	30%	150
○ Visiting nature parks or preserves	26%	146
 Overnight experiences	33%	125
○ Train trip	17%	117
○ Staying at resort or cabin in nature	15%	133
 Guided tours	19%	118
○ Wildlife or nature tours	12%	138
○ Helicopter or float plane tours	6%	125
 Winter-based sports	13%	141
○ Snowboarding or downhill skiing	7%	130
○ Snowshoeing or cross-country skiing	2%	127
 Casual sports	13%	130
○ Casual biking	4%	113
○ Fishing	6%	137
 Water-based sports	8%	119
 High-intensity sports	6%	154
 Cultural experiences or attractions	49%	73
 Local cuisine	42%	45
 Health and wellness	31%	99
 Shopping	25%	56
 Festivals and events	18%	76





OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHY WE TRAVEL



INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	50%	76	51%	84
To check off dream travel places	47%	105	52%	104
To escape from routine	38%	99	40%	107
To spend time with family	15%	74	21%	93
For adventure and excitement	44%	148	26%	126
To have memories from top travel spots	23%	128	16%	101
To have fun with friends	2%	80	5%	89
To learn through other cultures	25%	103	49%	114
For personal reflection and growth	16%	106	19%	118



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	38%	96	40%	92
Family / friends wanted to go	32%	89	28%	84
Festival or event	36%	91	30%	91
Kids wanted to go	24%	98	11%	95
Visiting friends / family	21%	91	14%	80
Special event (e.g., wedding, reunion)	26%	102	17%	79

12% 100
INDEX SCORE

Travel aligns with
children’s school schedule

17% 104
INDEX SCORE

Take time off for vacation
during major holidays

24% 105
INDEX SCORE

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



OUTDOOR EXPLORERS

OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

- We generally book trip elements about two months in advance, but start researching more in advance for longer distance trips.

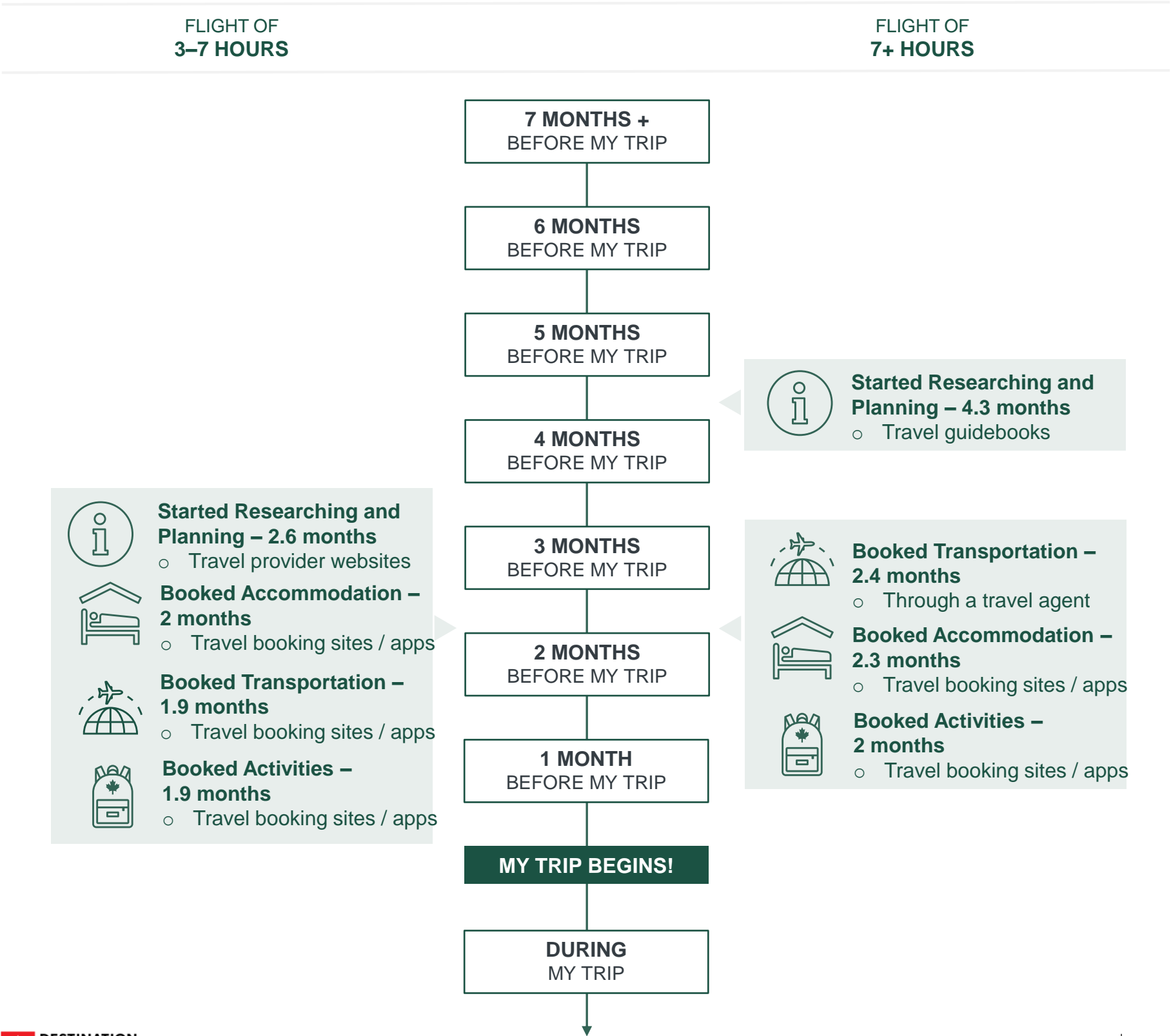
61%

Primary Trip Planner

126

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.






OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

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

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

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



TRIP TYPE	Mountain Retreat		
COMPANIONS	Couple only		28%
	Alone		24%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Escape & Relax
ACTIVITIES	See or explore mountains		55%
	Nature walks		40%
	Outdoor hot tub or bath		25%
KEY BEHAVIOURS	A bucket list destination known for outdoor landscapes and experiences		



TRIP TYPE	Adventure Destination		
COMPANIONS	Couple only		43%
	Alone		26%
TRIP EMOTIONAL MOTIVATIONS	Adventure	Fun	Security
ACTIVITIES	Nature walks		20%
	Cultural or traditional festivals		11%
	Visiting famous shopping centres		10%
KEY BEHAVIOURS	Finding adventure through some sport, but also in cultural festivals and events		



TRIP TYPE	Cultural Experience		
COMPANIONS	Alone		29%
	Couple only		24%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Simplicity	Escape & Relax
ACTIVITIES	Souvenir shopping		53%
	Local restaurants		40%
	Historical or archeological sites		40%
KEY BEHAVIOURS	Exploring with a little more structure, and it may be a solo trip and require some more comfort and security		



TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban centre		22%
	Historical site		20%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Local restaurants		39%
	Souvenir shopping		37%
	Historical or archeological sites		26%
KEY BEHAVIOURS	Quick and easy travel to a simple and relaxing destination		



OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

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



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Japan	65%	75	Australia	1%	90
US	7%	116	UK	1%	110
South Korea	4%	123	Thailand	1%	107
Antarctica	2%	154	Guam	1%	145
China	2%	113	Italy	1%	93



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	52%	138
Provide access to unique natural wonders	40%	143
Provides opportunities to view wildlife in its natural habitat	27%	153
Provides numerous opportunities for outdoor adventures	25%	155
Has many hidden gems	25%	143
Provides a remote, no-frills experience	18%	147
Offers options for adrenaline seekers	11%	157
Offers an energetic and dynamic cultural scene	10%	134



OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- If we have been to Canada before, it is likely been more than once.
- We overindex on propensity to visit most regions in Canada.
- Future trips to Canada may include Toronto or Quebec. We also think about specific attractions like Niagara Falls or the Rockies.



WHERE DO WE WANT TO GO IN CANADA

VANCOUVER OTTAWA QUEBEC
CANADIAN ROCKIES NOTRE DAME CATHEDRAL
TORONTO BANFF
CALGARY LAKE LOUISE
YELLOWKNIFE NIAGARA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	15%	97
BC	37%	130
MB	0%	80
NB	4%	105
NL	0%	78
NS	2%	97
NT	15%	136
NU	3%	129
ON	39%	124
PEI	6%	95
QC	33%	90
SK	9%	130
YT	5%	108



OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- Our travel to Canada to date has been during summer and fall months.
- We have researched some destinations in Canada.
- Our knowledge of Canada is average, some of us have done research thinking about future trips.



CANADA TRAVEL MONTHS ON A PAST TRIP

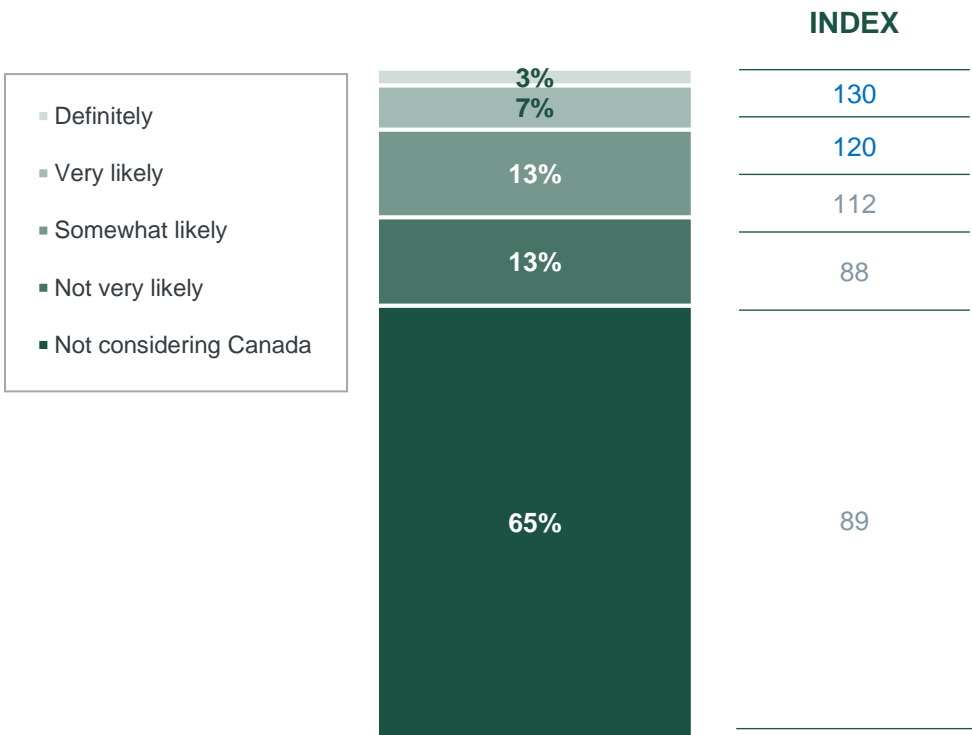
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	19%	22%	29%	38%
VS. TOTAL MARKET	18%	25%	37%	28%

5%

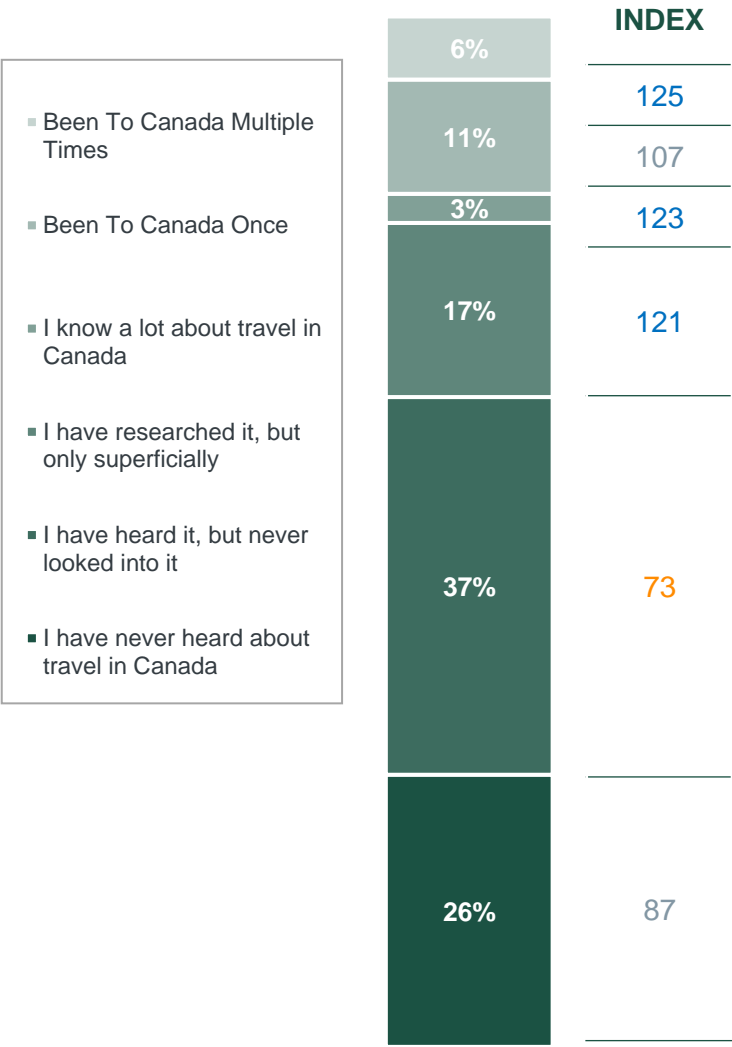
Been to Canada in last 5 years
104 INDEX SCORE



LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA





OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

- Recent life events have included a city or career move, and a large purchase like a vehicle.
- Beyond travel, our extra income is spent on personal care and continuing to grow our savings.



MAJOR LIFE EVENTS IN LAST 5 YEARS

3%

Had a child

97 INDEX SCORE

15%

Started a new job / career

108 INDEX SCORE

5%

Bought a new home

94 INDEX SCORE

15%

Moved to a new city

115 INDEX SCORE

10%

Child started school

98 INDEX SCORE

35%

Purchased a car

102 INDEX SCORE

10%

Retired

109 INDEX SCORE

19%

Renovated house

93 INDEX SCORE



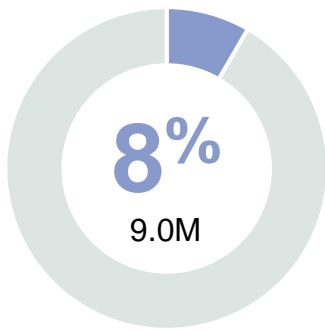
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	65%	110
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	56%	106
Savings and investments	46%	101
Personal care and wellness	45%	79
Fashion and accessories	22%	81
Experiences (e.g., concerts, events).	21%	113



CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN POPULATION

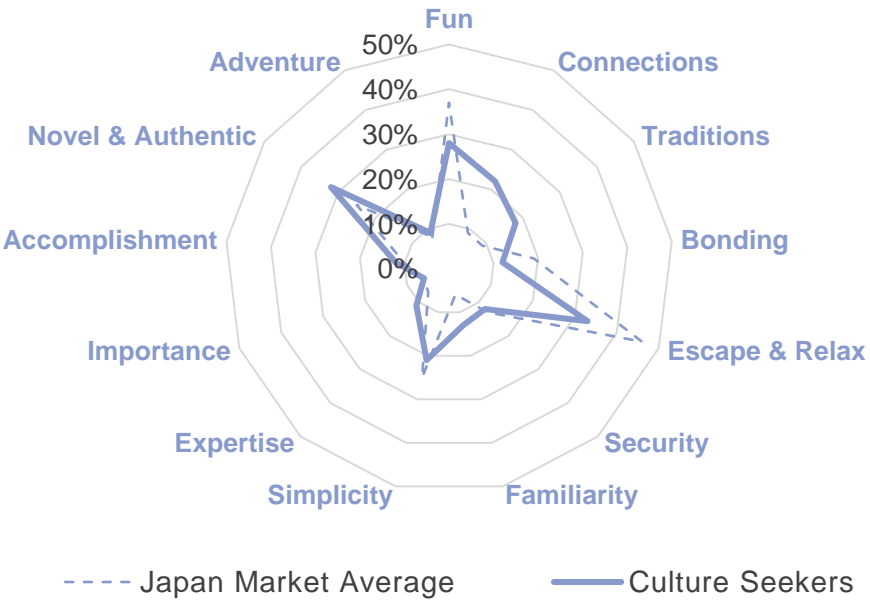
We are sociable, free-spirited individuals who seek unique, authentic experiences. We thrive on immersing ourselves in new perspectives, local culture, making connections, which boosts our energy and confidence.

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 are not afraid of trying something different like unconventional accommodations.
- 3 We try to learn the basics of the language before we travel so we can connect with new people and learn something new.
- 4 Though we like a bustling culture, we also seek destinations with a small town vibe where we can find moments of calm.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

132

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TRAVELLER ECONOMIC INDEX

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How is this calculated?

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CULTURE SEEKERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



OVERALL INSIGHT

- We seek new places and perspectives, and value connecting with locals.
- Staying flexible and being open to spontaneous experiences is how we get the most out of travel.
- We select destinations that are unique, open, and sociable, which aligns with our desire to explore.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	76%	123
Exploring the world through travel is an important milestone of growing up	73%	125
I try to keep a strict budget when I go on holiday	70%	130
I don't generally seek out luxury experiences while travelling	66%	110
I learn the basics of a language before visiting a country / region	61%	125
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	61%	123
Generally I'm not influenced by what destinations are popular or trendy at the moment	54%	119
When I travel to natural environments it makes me reflect on how fortunate I am	46%	125
I go where I want to go, no matter the hurdles	45%	116
I'm open to unconventional accommodations when travelling	44%	125
I seek out destinations that offer quiet opportunities for deep self-reflection	42%	115
I seek out destinations where I can explore my ancestral heritage	30%	122
I like to keep my travel plans flexible and often book on short notice	22%	128



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	48%	118
To open my mind to new perspectives	28%	136
To feel connected with new people	22%	145
To have a fun, social setting	21%	135
To create new, or take part in old, traditions	18%	142
To feel like a local	18%	151



DESIRED DESTINATION

	SCORE	INDEX
Open	38%	138
Friendly	29%	143
Accepting	27%	149
Unique	25%	132
Passionate	10%	121
Sociable	8%	130





CULTURE SEEKERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

- We represent a diverse age range and most of us do not have children living at home.
- We are working full-time or are self employed, and earn a medium to high income.



AGE

	SCORE	INDEX
18-34	20%	104
35-54	26%	93
55+	54%	105
MEAN YEARS	53.7	104



HH INCOME (CAD)

	SCORE	INDEX
\$45K or less	21%	99
>\$45K to \$100K	67%	108
More than \$100K	9%	101
Refused	3%	79



EMPLOYMENT

	SCORE	INDEX
Employed FT	40%	101
Employed PT	11%	80
Self-employed / Business owner	14%	140
Retired	14%	105



EDUCATION

	SCORE	INDEX
Primary education or less	1%	90
Secondary education	21%	80
Post-secondary education	78%	123



80%
118 Have a valid passport



GENDER

63% 137 Male

37% 62 Female

1% 140 Non-binary / Other



HOUSEHOLD

16% 97 Children <18 Living At Home*

19% 102 Children 18+ Living At Home*

23% 97 Children NOT Living At Home*

62% 105 No Children

* Option is not exclusive



JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	16%	113
Kanagawa	11%	125
Aichi	10%	141
Osaka	7%	64
Saitama	5%	96
Chiba	5%	94

	SCORE	INDEX
Hokkaido	4%	98
Hyogo	4%	67
Fukuoka	3%	89
Mie	3%	138
Hiroshima	3%	119



CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: NON-GROUP

97

TRAVEL TRADE INDEX: GROUP

92

KEY terminology on this page

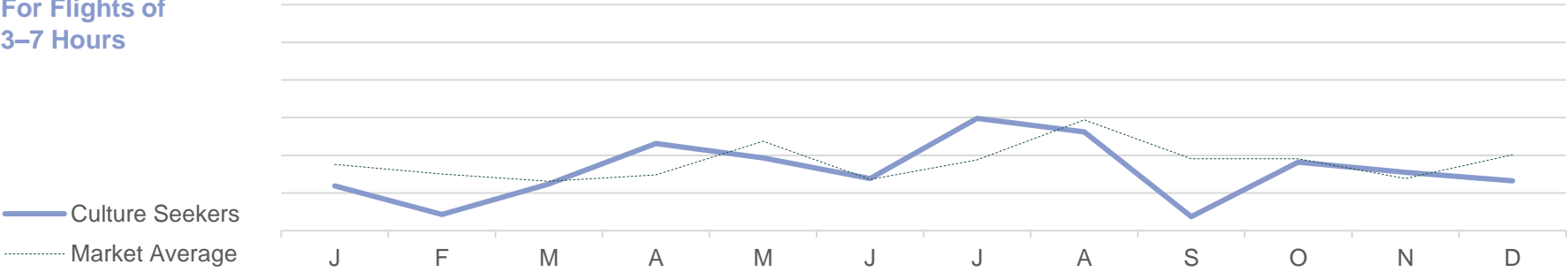
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).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

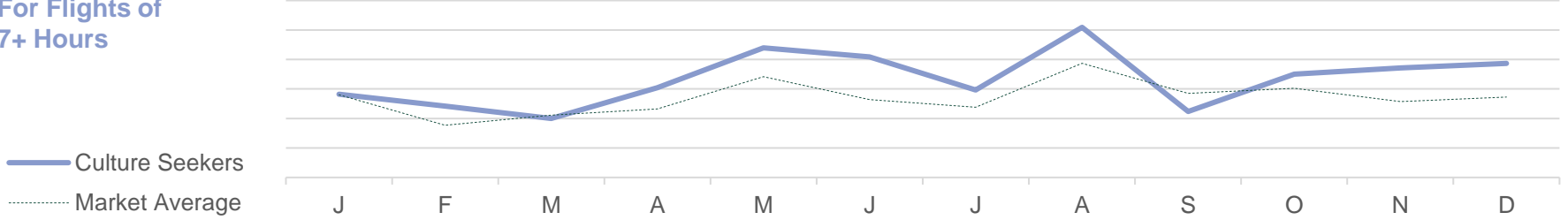


TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

INDEX

1-2 Days	42%	93
3-5 Days	20%	112
1 Week Holiday	5%	118
2 Weeks Holiday	2%	119
3 Weeks Or More	1%	134

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	48%	98
International Leisure	8%	117
Business Trip	16%	133
Added Personal To Business	7%	128
Worked During Vacation	4%	142

Incidence is frequency of 2+ times per year



CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	74%	95
Budget Hotel	27%	94
Premium Hotel	17%	92
Friend's or family's place	12%	126
Bed & Breakfast	8%	119
Hostel	5%	137



THOUGHTS ON INDIGENOUS TRAVEL

62%

131 INDEX SCORE

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

10%

116 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	90%	132
You only ever get to know a country by experiencing its culture	60%	132
I'm willing to put in the effort while travelling in order to see lesser-known places	53%	124
I'm open to travelling to destinations with limited tourist infrastructure	45%	130
I like to explore places that are off the beaten path and less explored	37%	118
I'm open to visiting destinations with challenging climates or weather conditions	29%	116



CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

- We are frequent solo travellers, and also travel with our partner.
- Our budgets are usually mid-ranged, but can splurge on an experience.



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	41%	81
Solo	34%	138
Adult relatives	17%	73
Friends	11%	96
Kids	10%	96



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$1,520

92
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	71%	134
It's important to me that I visit somewhere that is open to diversity	69%	137
Hearing from underrepresented communities is an important part of travelling	55%	132
I consider the impact that I personally have on the destinations I visit	54%	133
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	45%	127

43%

PRIORITIZE SUSTAINABLE TRAVEL

135 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 to engage with cultural attractions and explore history and heritage.
- We also explore and immerse in the destinations through food and local festivals.



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Cultural experiences or attractions	70%	119
○ Historical or archeological sites	51%	107
○ Museums	36%	128
○ Observing architecture	34%	114
 Local cuisine	69%	101
○ Local restaurants	52%	100
○ Street cuisine	29%	109
 Festivals and events	39%	130
○ Cultural or traditional festivals	26%	138
○ Music concerts or festivals	20%	124
 Casual sports	12%	122
○ Casual biking	4%	114
○ Fishing	5%	116
 Nightlife	9%	122
○ Bars and pubs	5%	113
○ Casinos	3%	142
 Shopping	42%	90
 Overnight experiences	26%	101
 Nature experiences	22%	83
 Health and wellness	20%	60
 Guided tours	18%	113
 Family-focused attractions	17%	89
 Winter-based sports	6%	97



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 check off dream travel places	39%	86	45%	79
To relax and unwind	54%	83	47%	78
To escape from routine	23%	67	42%	112
To spend time with family	33%	102	18%	90
To have memories from top travel spots	10%	89	15%	99
To have fun with friends	3%	82	8%	95
To learn through other cultures	28%	110	48%	113
To seek solitude and isolation	29%	142	13%	121
For adventure and excitement	15%	91	23%	117



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Festival or event	43%	103	46%	117
Partner / spouse wanted to go	31%	86	37%	88
Family / friends wanted to go	17%	68	33%	91
Visiting friends / family	42%	134	48%	134
Special event (e.g., wedding, reunion)	26%	102	27%	119
Kids wanted to go	13%	91	11%	95

9% 95 INDEX SCORE

Travel aligns with children’s school schedule

18% 107 INDEX SCORE

Take time off for vacation during major holidays

22% 97 INDEX SCORE

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



CULTURE SEEKERS

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

- We plan for long distance trips, researching well in advance. For shorter distance trips, we are booking planning and booking a couple months before.

63%

Primary Trip Planner

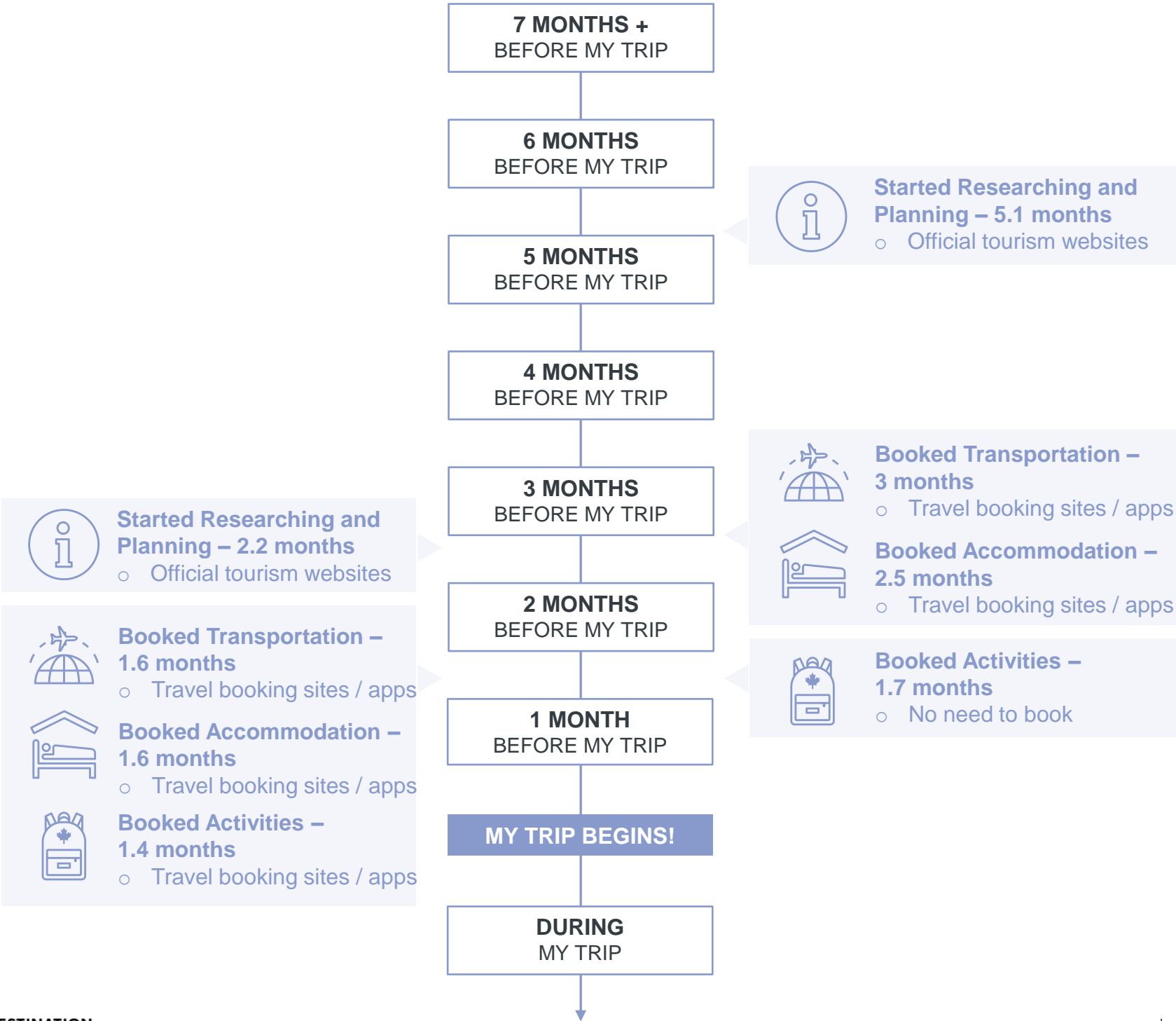
132 INDEX SCORE

! 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.
- We also take trips as a couple or with extended family 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	Solo Trip		
DESTINATION TYPE	Urban centre		27%
	Historical site		18%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants		36%
	Souvenir shopping		29%
	Cafes or bakeries		16%
KEY BEHAVIOURS	Budget accommodations, spending on food experiences, may be visiting friends		



TRIP TYPE	Cultural Experience		
COMPANIONS	Alone		29%
	Couple only		24%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Simplicity	Escape & Relax
ACTIVITIES	Souvenir shopping		53%
	Historical or archeological sites		40%
	Religious buildings or sites		21%
KEY BEHAVIOURS	Focussed on personal growth and exploring with an open mind. Spending more		



TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban centre		22%
	Historical site		20%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Local restaurants		39%
	Souvenir shopping		37%
	Historical or archeological sites		26%
KEY BEHAVIOURS	Planning less than a month before travel. Destination selected for cultural attraction		



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		41%
	Extended family		25%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Souvenir shopping		36%
	Outdoor hot tub or bath		33%
	Local restaurants		30%
KEY BEHAVIOURS	Easy and affordable trip to a familiar destination to just relax with family		



CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

- We seek rich culture and heritage, with attractions, festivals and events to explore.
- We travel domestically, but take regular international trips for both business and leisure.



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Japan	70%	87	Hong Kong	2%	135
US	5%	86	South Korea	2%	89
China	3%	151	France	2%	140
Australia	2%	110	UK	2%	124
Italy	2%	132	Singapore	2%	112



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	49%	123
Has a variety of museums and / or historical sites	41%	130
Provides a variety of local festivals and events	25%	146
Is inclusive and tolerant	24%	139
Has many hidden gems	21%	127
Has a small town feel	18%	129
Provides a bustling and vibrant city vibe	16%	128
Has a thriving arts and music scene	16%	147



CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- We are more likely to have visited Canada than other segments in Japan.
- Our visits have focused on Quebec and British Columbia.
- A future visit could include Toronto, Niagara, or Quebec.

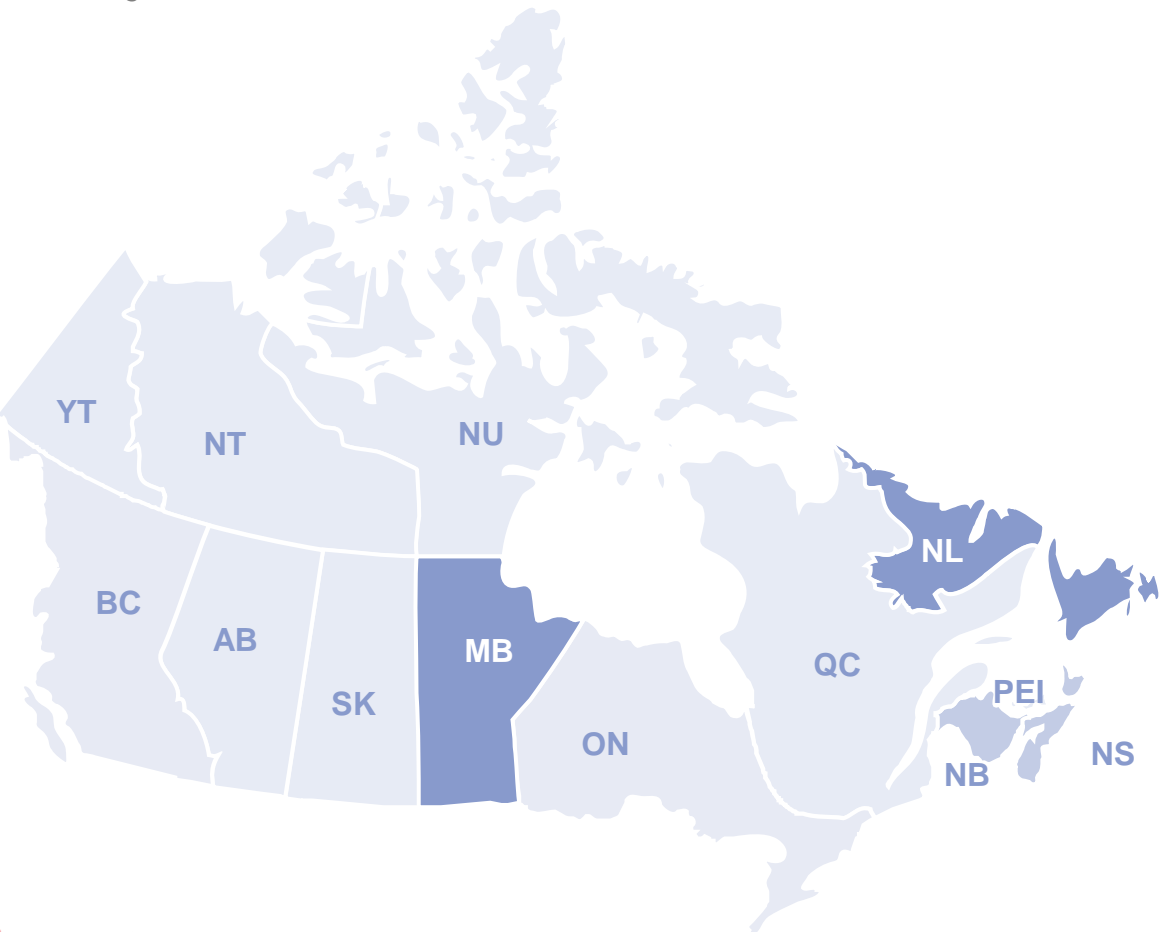


WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	16%	101
BC	25%	97
MB	5%	146
NB	5%	123
NL	10%	136
NS	4%	123
NT	8%	104
NU	2%	113
ON	28%	82
PEI	5%	93
QC	38%	108
SK	4%	103
YT	5%	114



CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- Travel to date in Canada has spanned most seasons.
- Overall, our knowledge of Canada as a travel destination has an opportunity to grow.



CANADA TRAVEL MONTHS ON A PAST TRIP

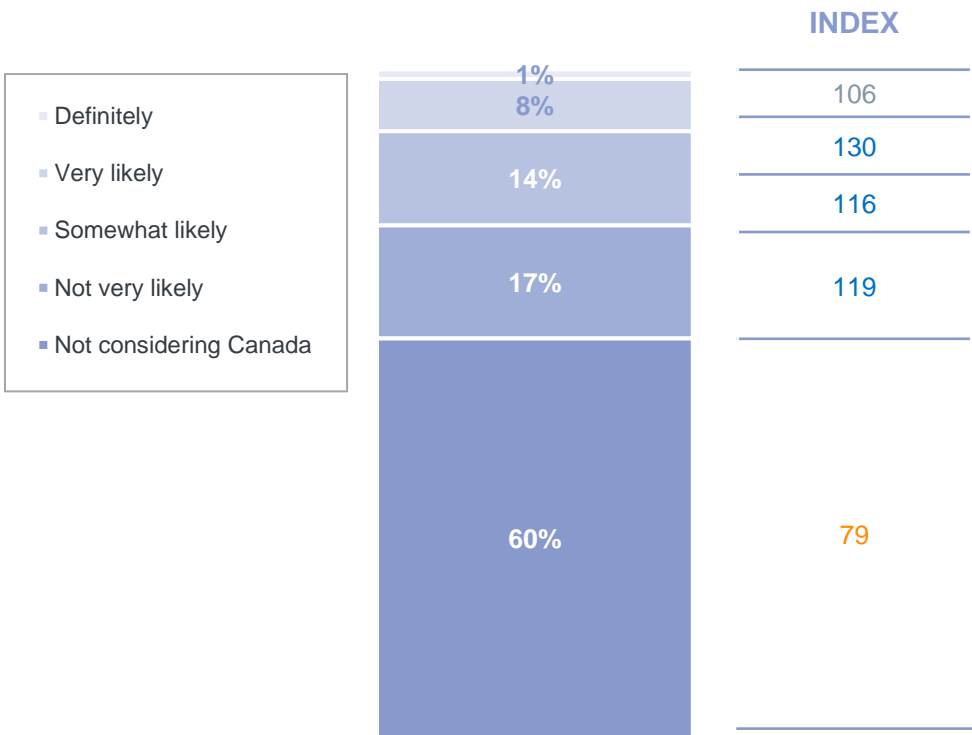
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CULTURE SEEKERS	23%	18%	38%	27%
VS. TOTAL MARKET	18%	25%	37%	28%

8%

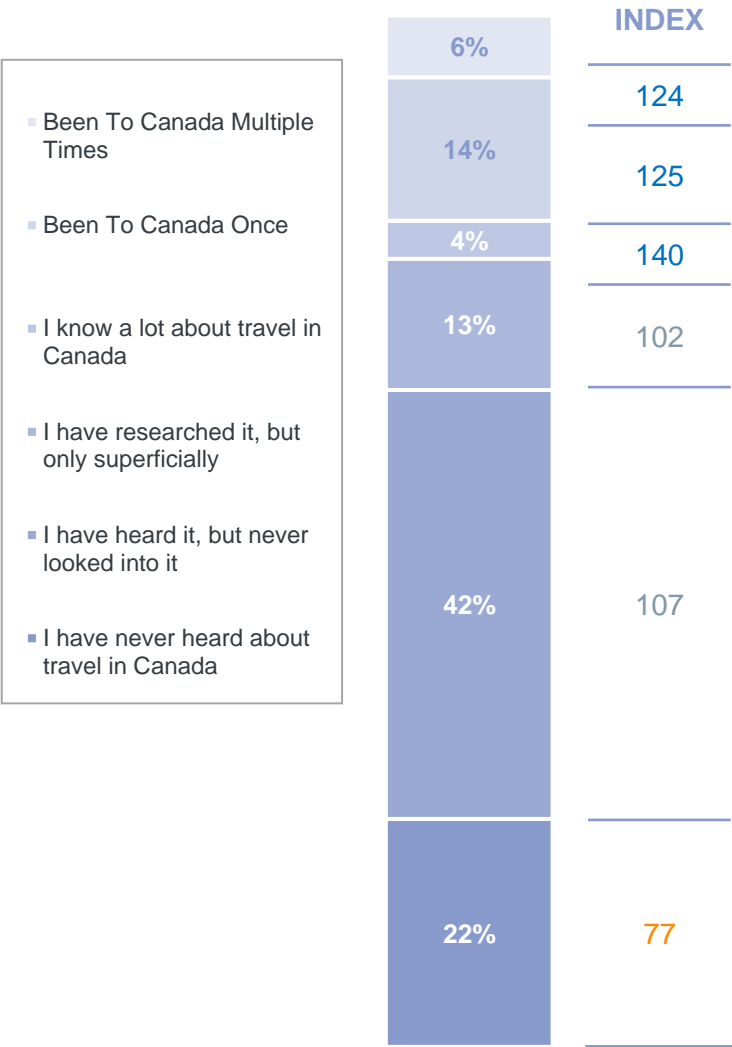
Been to Canada in last 5 years
128 INDEX SCORE



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 our hobbies.
- In the last 5 years, we have purchased a new car and invested in home renovations.



MAJOR LIFE EVENTS IN LAST 5 YEARS

1%

Had a child

94 INDEX SCORE

14%

Started a new job / career

104 INDEX SCORE

5%

Bought a new home

92 INDEX SCORE

12%

Moved to a new city

96 INDEX SCORE

9%

Child started school

96 INDEX SCORE

31%

Purchased a car

92 INDEX SCORE

11%

Retired

119 INDEX SCORE

26%

Renovated house

113 INDEX SCORE



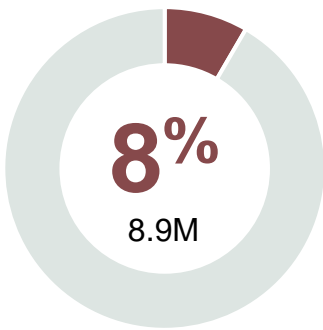
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	62%	102
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	59%	116
Savings and investments	48%	109
Personal care and wellness	42%	70
Technology and gadgets	23%	129
Fashion and accessories	22%	80



REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN POPULATION

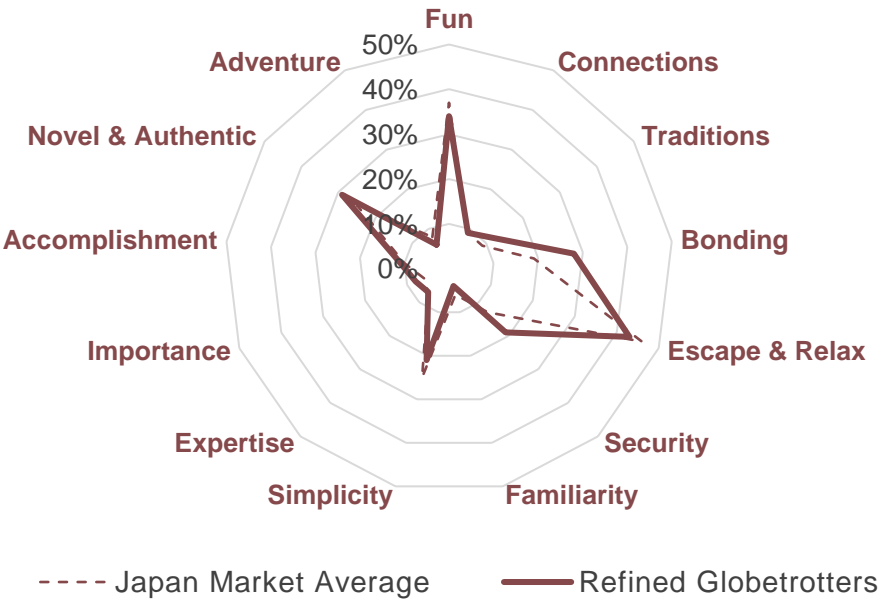
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross off our list.

We immerse ourselves in history, museums, and seek to learn something new from the cultures we experience. Our choice of the best destinations and attractions ensures safe, reliable, and welcoming experiences.

WHAT YOU NEED TO KNOW ABOUT ME

- 1 Travel is our #1 spending priority.
- 2 We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.
- 3 Planning how we will see all the history, museums, and architecture of a destination is paramount.
- 4 Selecting well-known attractions and experiences ensures we will feel welcome and can be confident in the quality and safety.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

115

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

141

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 want to experience luxury and indulge in world-class experiences.
- Feeling welcomed and confident that our destinations are safe and reliable are a needed comfort.
- Joining tours and working with travel agents ensures a smooth, enlightening travel experience.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm passionate about travelling	98%	143
I'm always on the look out for new destinations to visit next	93%	126
I like to come back from travels having learnt something new	76%	123
While I think about value for money, it doesn't tend to influence my choice of destination	71%	133
Luxury experiences are an important part of travel	70%	150
I am more likely to select destinations / activities that invest in socially responsible tourism	69%	141
When there's a lot of positive buzz about a destination it makes me want to visit it more	65%	127
I make sure to visit the "famous" sites wherever I go	64%	138
I seek travel advice from travel agencies and agents	49%	148
I tend to not think about my budget too much when travelling	45%	141
I enjoy joining guided tours to explore new destinations	43%	147
I seek out fine dining experiences and gourmet cuisine when I travel	34%	154
When traveling, I expect 24 / 7 support from a travel provider	34%	137



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	49%	122
To share quality time with others	35%	137
To feel safe and secure	24%	130
To bond through shared experiences	22%	118
To feel welcomed	13%	140
To create new, or take part in old, traditions	12%	115



DESIRED DESTINATION

	SCORE	INDEX
Safe	62%	113
Reliable	52%	121
Luxurious	43%	151
Authentic	30%	146
Exclusive	25%	156
World-Class	18%	155





REFINED GLOBETROTTERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

- Many of us are employed full time, and some of us are retired.
- If we are not working for an employer, we are working full time to maintain our home.
- We have medium to high incomes or net worth.



AGE

	SCORE	INDEX
18-34	13%	74
35-54	22%	88
55+	66%	118
MEAN YEARS	57.9	121



HH INCOME (CAD)

	SCORE	INDEX
\$45K or less	10%	53
>\$45K to \$100K	70%	131
More than \$100K	16%	147
Refused	4%	107



EMPLOYMENT

	SCORE	INDEX
Employed FT	34%	90
Employed PT	10%	69
Self-employed / Business owner	8%	90
Retired	17%	117



EDUCATION

	SCORE	INDEX
Primary education or less	1%	85
Secondary education	27%	101
Post-secondary education	73%	102



87%
134 Have a valid passport



GENDER

44% 86 Male

56% 114 Female

0% 80 Non-binary / Other



HOUSEHOLD

11% 94 Children <18 Living At Home*

22% 115 Children 18+ Living At Home*

34% 124 Children NOT Living At Home*

55% 99 No Children

* Option is not exclusive



JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	20%	136
Osaka	10%	129
Aichi	9%	119
Kanagawa	8%	87
Saitama	6%	110
Chiba	5%	106

	SCORE	INDEX
Hyogo	5%	100
Kyoto	3%	115
Hokkaido	3%	81
Shizuoka	3%	95
Nara	3%	136



REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: NON-GROUP

126

TRAVEL TRADE INDEX: GROUP

128

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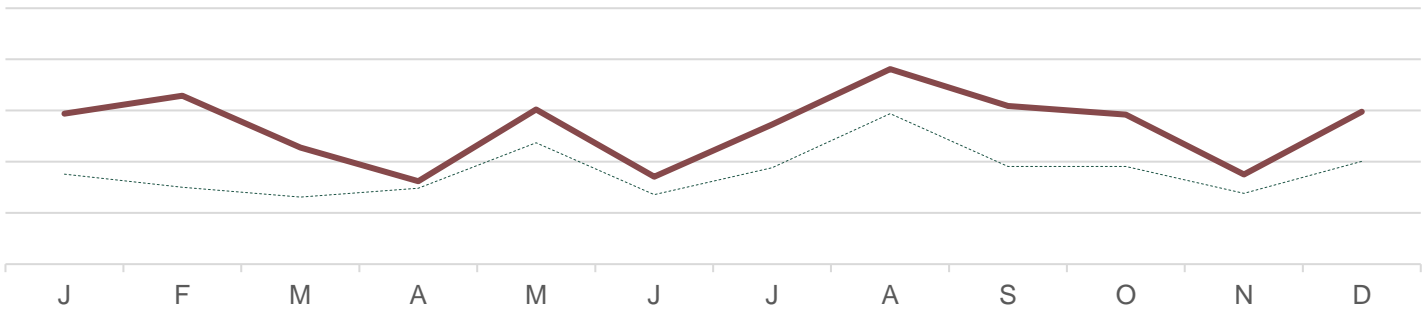
For additional definitions see [Glossary](#)



TYPICAL TRAVEL MONTHS

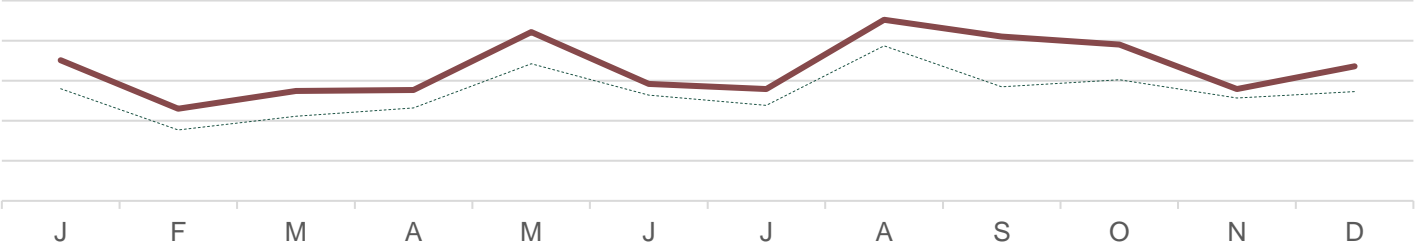
For Flights of 3–7 Hours

— Refined Globetrotters
- - - Market Average



For Flights of 7+ Hours

— Refined Globetrotters
- - - Market Average



TRIP DURATION

INDEX

1-2 Days	53%	133
3-5 Days	28%	138
1 Week Holiday	6%	132
2 Weeks Holiday	3%	143
3 Weeks Or More	1%	134

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

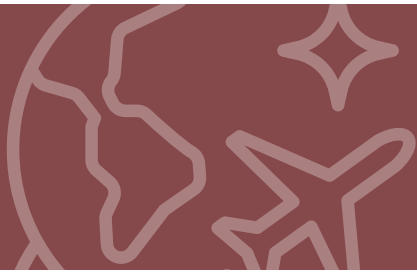
Domestic Leisure	62%	141
International Leisure	11%	134
Business Trip	12%	112
Added Personal To Business	7%	130
Worked During Vacation	3%	116

Incidence is frequency of 2+ times per year



REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	68%	64
Premium Hotel	46%	149
High-end / Luxury Hotel	14%	152
Budget Hotel	10%	62
Friend's or family's place	8%	81
All-inclusive resort	5%	148



THOUGHTS ON INDIGENOUS TRAVEL

46%

109 INDEX SCORE

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

11%

119 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%	123
You only ever get to know a country by experiencing its culture	57%	126
I'm willing to put in the effort while travelling in order to see lesser-known places	36%	100
I'm open to visiting destinations with challenging climates or weather conditions	25%	106
I'm open to travelling to destinations with limited tourist infrastructure	25%	90
I like to explore places that are off the beaten path and less explored	19%	90





REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

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



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	65%	114
Adult relatives	25%	115
Friends	10%	92
Kids	10%	96
Solo	9%	79



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$2,380

127
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	62%	115
It's important to me that I visit somewhere that is open to diversity	54%	115
I consider the impact that I personally have on the destinations I visit	40%	108
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	39%	114
Hearing from underrepresented communities is an important part of travelling	38%	106

33%

PRIORITIZE
SUSTAINABLE
TRAVEL

113 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 and luxury in both cuisine and shopping are a priority.
- We like to explore historical sites and local culture, through guided tours or train trips.



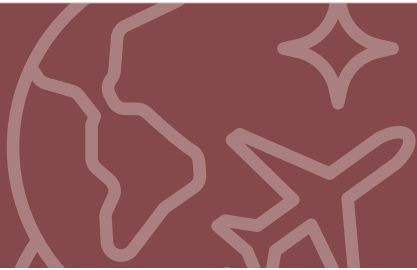
TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Local cuisine	79%	121
○ Local restaurants	61%	120
○ Luxury dining	36%	149
○ Cafes or bakeries	29%	113
 Cultural experiences or attractions	74%	129
○ Historical or archeological sites	62%	130
○ Observing architecture	38%	127
 Overnight experiences	36%	134
○ Train trip	18%	126
○ Staying at resort or cabin in nature	12%	120
 Guided tours	24%	138
○ City tours	14%	137
○ Food tours	12%	146
 Nightlife	8%	116
○ Bars and pubs	5%	114
○ Clubs and dancing	2%	131
 Shopping	47%	100
 Nature experiences	36%	108
 Health and wellness	30%	95
 Family-focused attractions	26%	97
 Festivals and events	22%	86
 Casual sports	8%	99
 Water-based sports	6%	107



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	73%	114	64%	104
To check off dream travel places	48%	106	57%	123
To spend time with family	37%	109	34%	105
To escape from routine	34%	90	27%	80
To have memories from top travel spots	16%	109	17%	103
To learn through other cultures	33%	119	38%	100
To have fun with friends	7%	94	10%	100
To be pampered	13%	131	11%	124
For adventure and excitement	13%	87	10%	78



EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	53%	116	49%	103
Family / friends wanted to go	49%	114	45%	106
Festival or event	43%	103	35%	100
Visiting friends / family	23%	95	25%	97
Kids wanted to go	26%	100	18%	100
Special event (e.g., wedding, reunion)	24%	98	24%	108

11% 98 INDEX SCORE

Travel aligns with children’s school schedule

20% 112 INDEX SCORE

Take time off for vacation during major holidays

16% 74 INDEX SCORE

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



REFINED GLOBETROTTERS

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

- For longer distance trips we book key elements nearly three months in advance, and use a variety of online resources.

50%

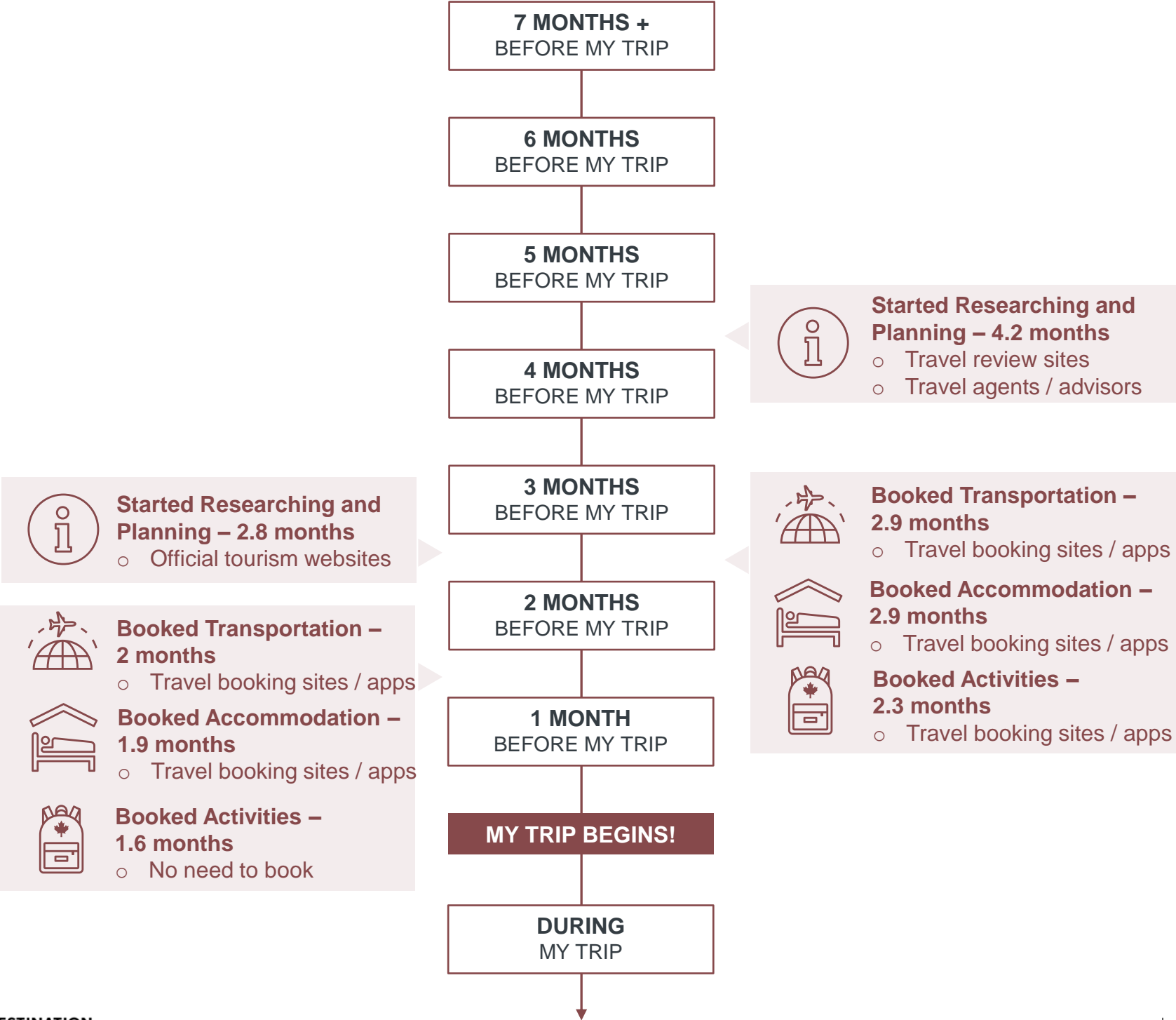
Primary Trip Planner

98 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 luxury and world renowned destinations.
- We also take trips like Outdoor Explorers.

 **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	Luxury Resort		
COMPANIONS	Couple only		53%
	Extended family		36%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Fun
ACTIVITIES	Local restaurants		35%
	Luxury dining		29%
	Souvenir shopping		29%
KEY BEHAVIOURS	Seeking high-end and exclusive experiences. Focussed on relaxation		



TRIP TYPE	Historical Site		
COMPANIONS	Couple only		50%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Novel & Authentic	Simplicity
ACTIVITIES	Historical or archeological sites		63%
	Local restaurants		48%
	Souvenir shopping		46%
KEY BEHAVIOURS	Crossing a famous attraction off the list. Seeking an authentic but reliable experience		



TRIP TYPE	Food and Wine Capital		
COMPANIONS	Couple only		50%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants		69%
	Luxury dining		38%
	Cooking lessons		26%
KEY BEHAVIOURS	All about immersing ourselves in culinary experiences, and having fun with family		



TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		44%
	Alone		33%
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Historical or archeological sites		22%
	Outdoor hot tub or bath		19%
	Wildlife or nature tours		14%
KEY BEHAVIOURS	Slightly lower budget, more focus on seeing natural landscapes and rich culture		



REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

- We enjoy exploring well-known and luxury destinations, with access to nature, through curated experiences.
- We travel most frequently to more domestic destinations, and travel internationally at least once a year.



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Japan	66%	77	Singapore	2%	122
US	7%	118	UK	2%	128
South Korea	4%	116	France	2%	124
Australia	4%	137	Thailand	1%	105
Italy	2%	132	Hong Kong	1%	106



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	54%	132
Has packaged holiday / vacation offers	13%	140
Known for stunning natural landscapes	46%	127
Renowned for food and drink experiences	45%	132
Has a variety of museums and / or historical sites	39%	124
Provide access to unique natural wonders	36%	132
Has luxury dining, shopping, and accommodations	32%	151
Ideal setting for romantic getaways	20%	142



REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- We may have been to Canada before, but perhaps not recently.
- Overall we have visited a variety of destinations in Canada.
- A future trip to Canada could include Toronto, Niagara Falls, or Vancouver.

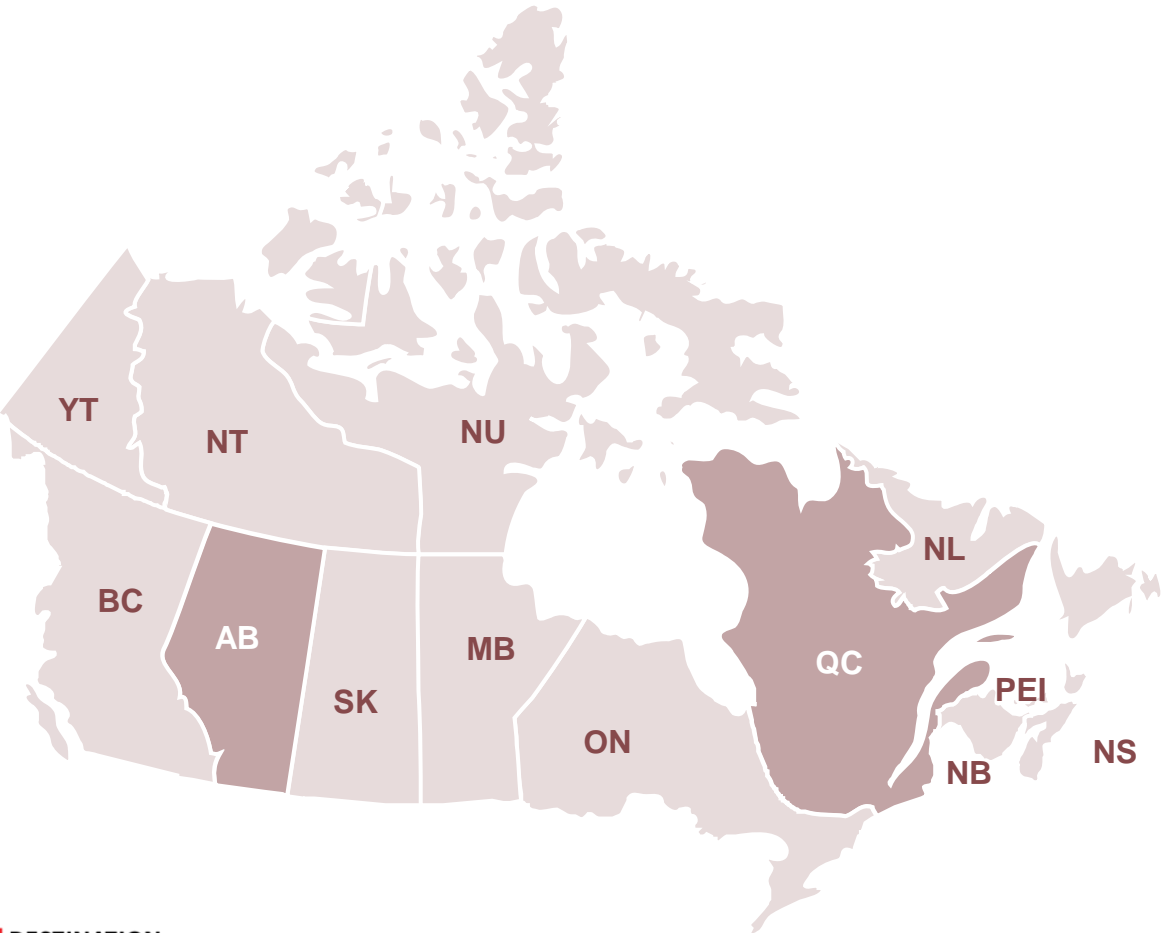


WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	22%	123
BC	20%	82
MB	2%	99
NB	2%	81
NL	3%	94
NS	0%	76
NT	7%	99
NU	0%	73
ON	33%	104
PEI	7%	107
QC	40%	117
SK	0%	82
YT	4%	102



REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- We are most likely to have visited during the summer months.
- Overall we have some knowledge of Canada, and may consider a trip in the future.



CANADA TRAVEL MONTHS ON A PAST TRIP

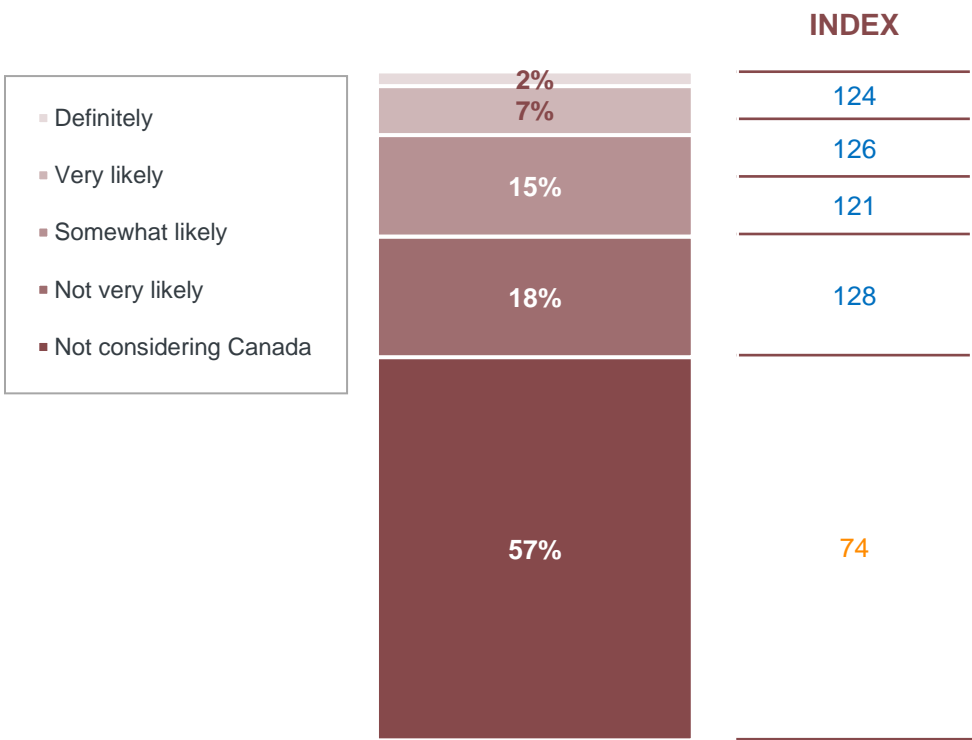
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	8%	26%	41%	29%
VS. TOTAL MARKET	18%	25%	37%	28%

6%

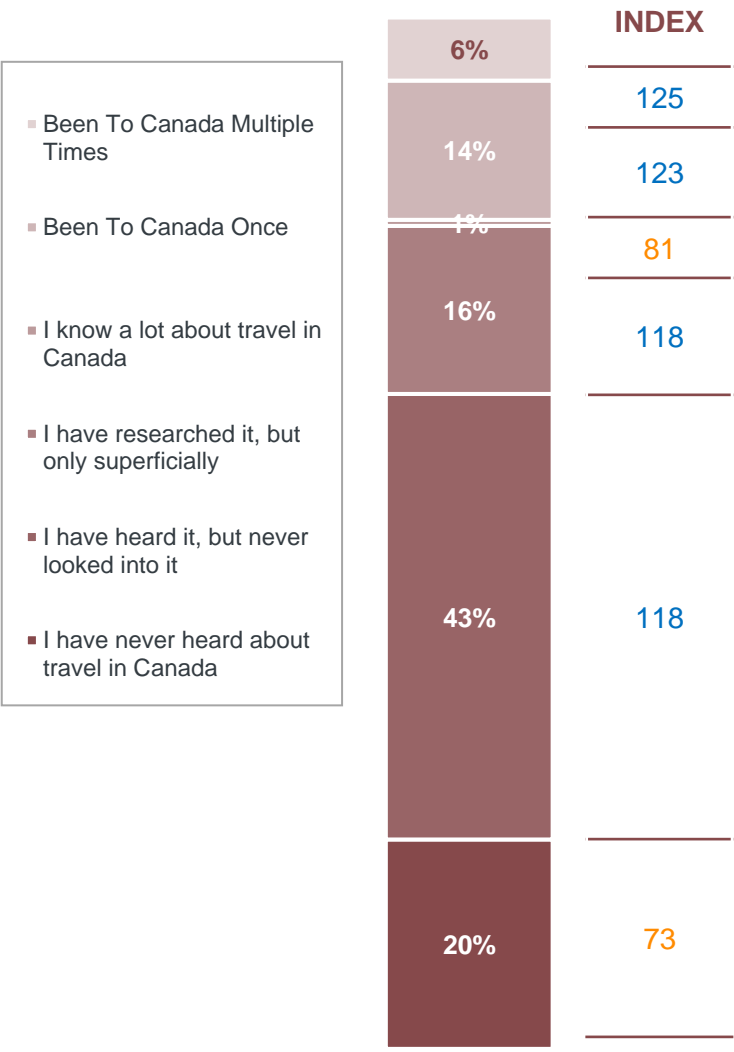
Been to Canada in last 5 years
118 INDEX SCORE



LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA





REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

- Recent larger expenses include investing in a new car and renovating our homes.
- After spending on travel, our next biggest priority is personal care and wellness expenses.



MAJOR LIFE EVENTS IN LAST 5 YEARS

2%

Had a child
96 INDEX SCORE

8%

Started a new job / career
70 INDEX SCORE

8%

Bought a new home
106 INDEX SCORE

9%

Moved to a new city
79 INDEX SCORE

7%

Child started school
94 INDEX SCORE

43%

Purchased a car
124 INDEX SCORE

5%

Retired
76 INDEX SCORE

33%

Renovated house
134 INDEX SCORE



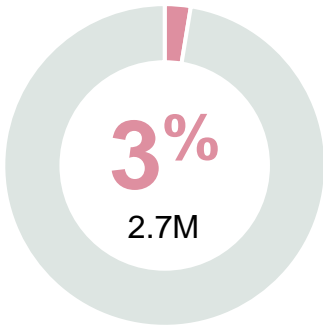
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	75%	135
Personal care and wellness	51%	108
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	49%	80
Savings and investments	43%	89
Fashion and accessories	29%	105
Home and decor	17%	100



PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



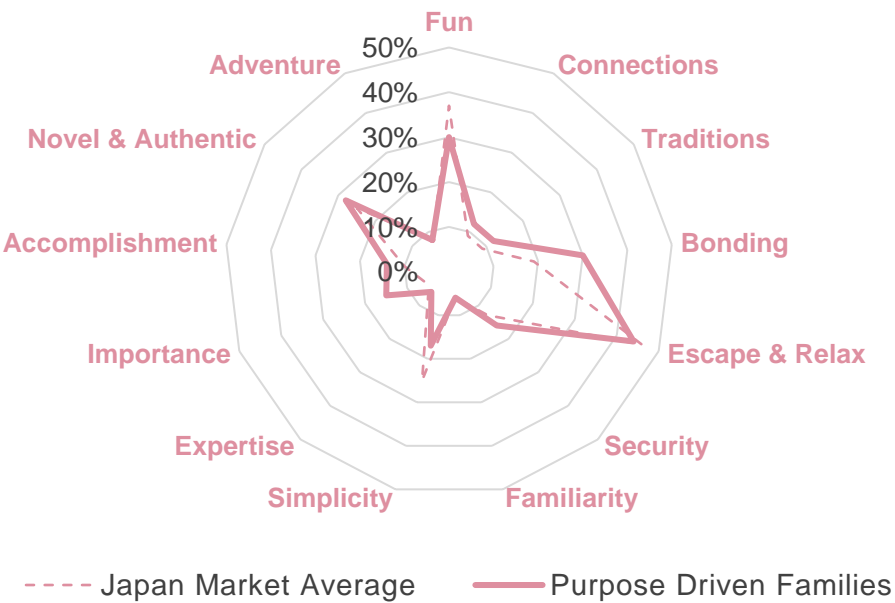
% OF JAPAN POPULATION

We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish 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 are not big deterrents; we seek socially responsible, impressive, new experiences.

WHAT YOU NEED TO KNOW ABOUT ME

- 1 We prioritize authentic exploration that allows us to discover and learn about the world.
- 2 Being trendy includes being trendsetters in travel choices and behaviours, which includes prioritizing sustainability and responsible travel.
- 3 Staying active and exploring the outdoors or unconventional experiences is an important way learn new things.
- 4 We are planners and like to know what comes next, and are open to travel agent support as well as digital planners to assist us.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

131

How is this calculated?

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



TRAVELLER ECONOMIC INDEX

132

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 are passionate about travel, and seek authentic destinations that will make our friends say 'wow'.
- We use travel to bond and create memories, and value that we can provide these experiences to our children.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	77%	125
Exploring the world through travel is an important milestone of growing up	74%	126
I'm a planner, while travelling I like to know what comes next	68%	155
When there's a lot of positive buzz about a destination it makes me want to visit it more	67%	131
I learn the basics of a language before visiting a country / region	61%	125
Luxury experiences are an important part of travel	56%	126
I'd be open to using AI-powered chatbots for travel planning and assistance	52%	156
I feel best on vacation when being highly active	51%	118
I'm open to unconventional accommodations when travelling	49%	135
I prefer to explore quickly and cover as much ground as possible at historic sites or museums	45%	125
Even while travelling, I like to maintain regular contact with my duties or obligations back home	39%	150
When traveling, I expect 24 / 7 support from a travel provider	33%	134
I seek out destinations where I can explore my ancestral heritage	30%	123



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	33%	131
To bond through shared experiences	28%	143
To open my mind to new perspectives	26%	131
To have authentic experiences	26%	132
To feel like I'm important	15%	156
To feel welcomed	12%	131



DESIRED DESTINATION

	SCORE	INDEX
Caring	28%	150
Friendly	26%	129
Unique	22%	123
Accepting	21%	127
Familiar	16%	122
Passionate	10%	120



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 medium to high incomes.



AGE

	SCORE	INDEX
18-34	18%	94
35-54	63%	142
55+	19%	65
MEAN YEARS	46.2	73



HH INCOME (CAD)

	SCORE	INDEX
\$45K or less	17%	85
>\$45K to \$100K	69%	122
More than \$100K	11%	115
Refused	3%	74



EMPLOYMENT

	SCORE	INDEX
Employed FT	65%	150
Employed PT	15%	130
Self-employed / Business owner	5%	68
Retired	1%	56



EDUCATION

	SCORE	INDEX
Primary education or less	3%	148
Secondary education	14%	51
Post-secondary education	83%	144



73%
103 Have a valid passport



GENDER

62% 134 Male

38% 67 Female

0% 80 Non-binary / Other



HOUSEHOLD

83% 144 Children <18 Living At Home*

8% 56 Children 18+ Living At Home*

8% 62 Children NOT Living At Home*

9% 56 No Children

* Option is not exclusive



JAPAN PREFECTURE BREAKOUT

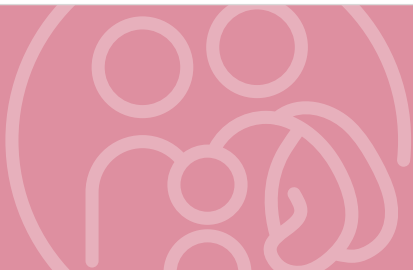
	SCORE	INDEX
Tokyo	16%	108
Osaka	10%	136
Kanagawa	9%	97
Chiba	7%	144
Hokkaido	6%	118
Saitama	6%	120

	SCORE	INDEX
Shizuoka	5%	146
Hyogo	5%	100
Aichi	4%	69
Kyoto	4%	139
Fukuoka	3%	100



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS



TRAVEL TRADE INDEX: NON-GROUP

116

TRAVEL TRADE INDEX: GROUP

109

! 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

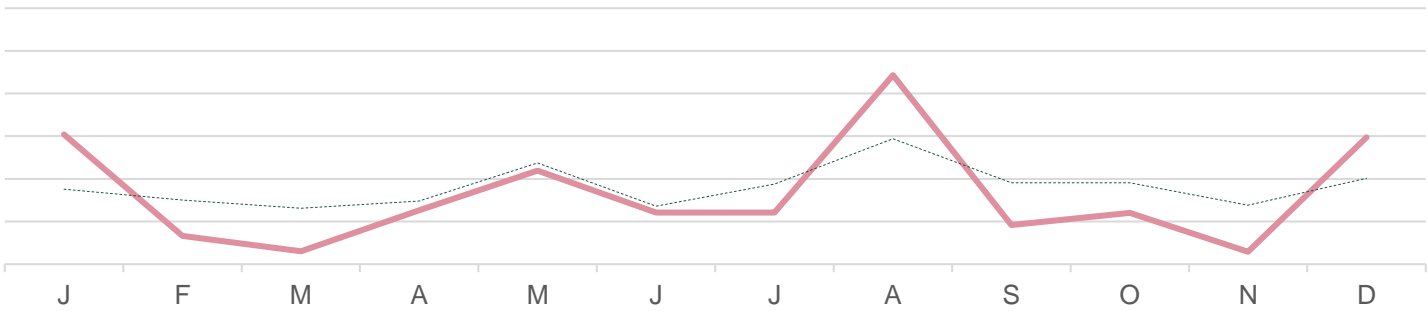
For additional definitions see [Glossary](#)



TYPICAL TRAVEL MONTHS

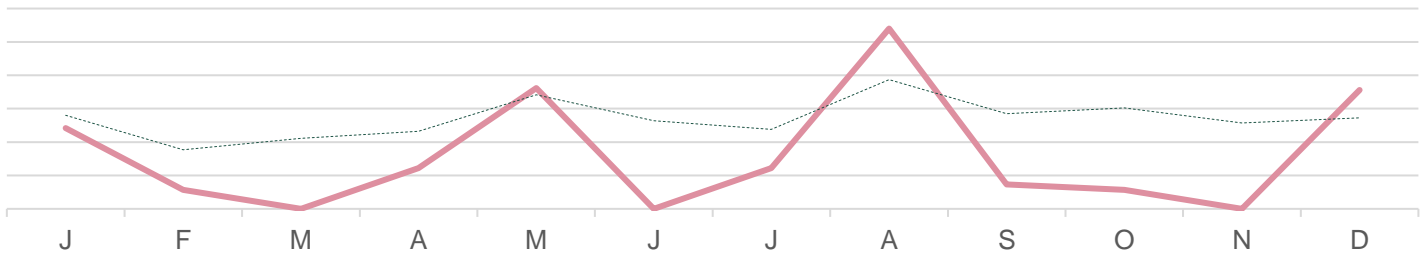
For Flights of 3–7 Hours

— Purpose Driven Families
..... Market Average



For Flights of 7+ Hours

— Purpose Driven Families
..... Market Average



TRIP DURATION

INDEX

1-2 Days	52%	130
3-5 Days	20%	111
1 Week Holiday	2%	84
2 Weeks Holiday	2%	116
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	54%	116
International Leisure	7%	109
Business Trip	18%	139
Added Personal To Business	3%	91
Worked During Vacation	2%	107

Incidence is frequency of 2+ times per year



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	69%	71
Premium Hotel	31%	120
Budget Hotel	13%	69
Bed & Breakfast	9%	130
Campsite	9%	159
High-end / Luxury Hotel	8%	118



THOUGHTS ON INDIGENOUS TRAVEL

59%

127 INDEX SCORE

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

11%

121 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%	110
You only ever get to know a country by experiencing its culture	52%	117
I'm willing to put in the effort while travelling in order to see lesser-known places	37%	102
I like to explore places that are off the beaten path and less explored	24%	99
I'm open to travelling to destinations with limited tourist infrastructure	23%	88
I'm open to visiting destinations with challenging climates or weather conditions	23%	102



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	84%	140
Kids	74%	144
Adult relatives	19%	85
Friends	8%	81
Solo	6%	71



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$2,750

142
INDEX SCORE

SPEND STYLE

Premium / Upscale



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	71%	133
It's important to me that I visit somewhere that is open to diversity	63%	129
Hearing from underrepresented communities is an important part of travelling	59%	137
I consider the impact that I personally have on the destinations I visit	55%	136
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	47%	131

40%

PRIORITIZE
SUSTAINABLE
TRAVEL

127 INDEX SCORE

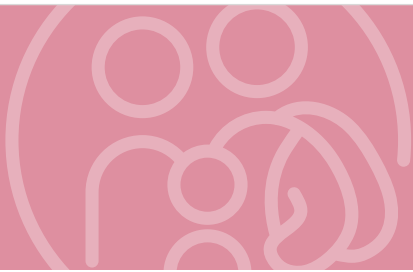
! KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **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

- Family attractions, festivals, and local cuisine are highlights.
- We also like to try the top sports in our destinations, both winter and summer.



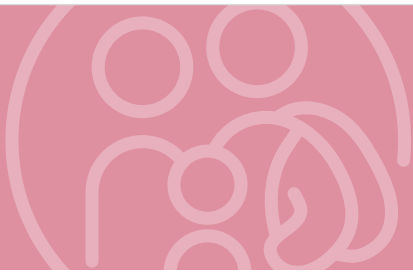
TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Family-focused attractions	63%	130
○ Amusement parks or theme parks	55%	129
○ Zoos or aquariums	54%	133
○ Space or science centres	25%	146
 Festivals and events	33%	115
○ Cultural or traditional festivals	21%	120
○ Live theatre	10%	139
 Water-based sports	13%	156
○ Scuba diving or snorkeling	10%	159
○ Swimming	5%	158
 Casual sports	12%	127
○ Casual biking	7%	147
○ Fishing	5%	124
 Winter-based sports	13%	141
○ Snowboarding or downhill skiing	10%	152
○ Snowshoeing or cross-country skiing	3%	146
 Local cuisine	72%	108
 Cultural experiences or attractions	53%	83
 Shopping	53%	111
 Nature experiences	35%	107
 Health and wellness	29%	94
 Overnight experiences	26%	102
 Guided tours	12%	87



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	55%	138	53%	120
To relax and unwind	60%	92	94%	148
To check off dream travel places	37%	83	44%	74
To escape from routine	43%	108	25%	74
For adventure and excitement	13%	87	6%	66
To have memories from top travel spots	15%	103	11%	86
To be pampered	10%	114	11%	126
To learn through other cultures	24%	102	40%	103
For personal reflection and growth	15%	101	11%	95



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	68%	130	72%	136
Partner / spouse wanted to go	58%	123	82%	144
Family / friends wanted to go	63%	134	76%	148
Festival or event	60%	132	37%	103
Special event (e.g., wedding, reunion)	52%	142	30%	131
Visiting friends / family	31%	112	6%	66

49% 154
INDEX SCORE

Travel aligns with
children’s school schedule

37% 155
INDEX SCORE

Take time off for vacation
during major holidays

34% 142
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 do not always plan all activities in advance, but will plan a few months ahead for transportation and accommodation.

56%

Primary Trip Planner

112
INDEX SCORE

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

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

FLIGHT OF
3–7 HOURS

FLIGHT OF
7+ HOURS

7 MONTHS +
BEFORE MY TRIP

6 MONTHS
BEFORE MY TRIP

5 MONTHS
BEFORE MY TRIP

4 MONTHS
BEFORE MY TRIP

3 MONTHS
BEFORE MY TRIP

2 MONTHS
BEFORE MY TRIP

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP

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

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




PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

- Our top trips focus on reliable and safe family travel to well-known and luxury resorts.
- We also take trips like Fun & Sun Families.

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

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

% OF TOTAL TRIPS

14%
138 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		57%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Souvenir shopping		42%
	Oceanside beaches		39%
	Swimming		21%
KEY BEHAVIOURS	Exploring natural landscapes and getting active in local sports		

% OF TOTAL TRIPS

8%
104 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Luxury Resort		
COMPANIONS	Nuclear family with kids		64%
	Couple only		19%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Adventure
ACTIVITIES	Amusement parks or theme parks		37%
	Local restaurants		37%
	Souvenir shopping		27%
KEY BEHAVIOURS	Seeking unique and well-established experiences. Want to relax and be pampered		

% OF TOTAL TRIPS

18%
157 INDEX SCORE

SEGMENT ALIGNMENT

TRIP TYPE	Urban Centre		
COMPANIONS	Nuclear family with kids		58%
	Extended family		18%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Souvenir shopping		50%
	Amusement parks or theme parks		47%
	Local restaurants		46%
KEY BEHAVIOURS	Easy to access as other family may be joining. Affordable accommodations		

% OF TOTAL TRIPS

10%
117 INDEX SCORE

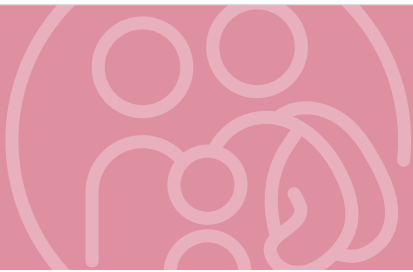
SEGMENT ALIGNMENT

TRIP TYPE	Suburban Experience		
COMPANIONS	Nuclear family with kids		74%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Souvenir shopping		49%
	Local restaurants		41%
	Outdoor hot tub or bath		24%
KEY BEHAVIOURS	Lower budget. Easy and straight forward trip, all about the kids		



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

- We are looking for trendy kid-friendly access to nature and wildlife.
- Most of our travel explores East Asian and Pacific destinations, but we also explore North America.



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Japan	66%	78	Hong Kong	2%	137
US	10%	148	Vietnam	1%	135
South Korea	5%	141	French Polynesia	1%	161
Thailand	3%	156	Germany	1%	135
Singapore	3%	146	China	1%	94



WHERE DO WE WANT TO GO

OKINAWA ENGLAND SPAIN AMERICA
GERMANY SINGAPORE CRETE
KOREA MEXICO HAWAII PHILIPPINES TAIWAN
AZERBAIJAN ITALY INDONESIA AFRICA THAILAND FRANCE
AUSTRALIA TOHOKU HOKKAIDO



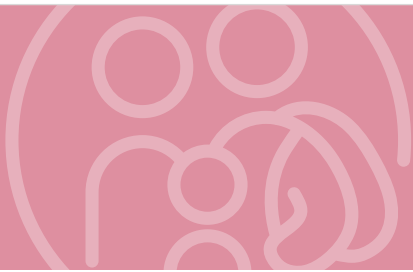
DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	84%	144
Known for stunning natural landscapes	39%	113
Is inclusive and tolerant	24%	140
Offers natural landscapes in close proximity to city amenities	20%	122
Has luxury dining, shopping, and accommodations	16%	109
Provides opportunities to view wildlife in its natural habitat	14%	113
Provides numerous opportunities for outdoor adventures	12%	113
Has vibrant nightlife and entertainment	10%	128



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- We are likely to have visited Canada, and perhaps recently in the last few years.
- Trips to date have explored most provinces.



WHERE DO WE WANT TO GO IN CANADA

TORONTO

VANCOUVER

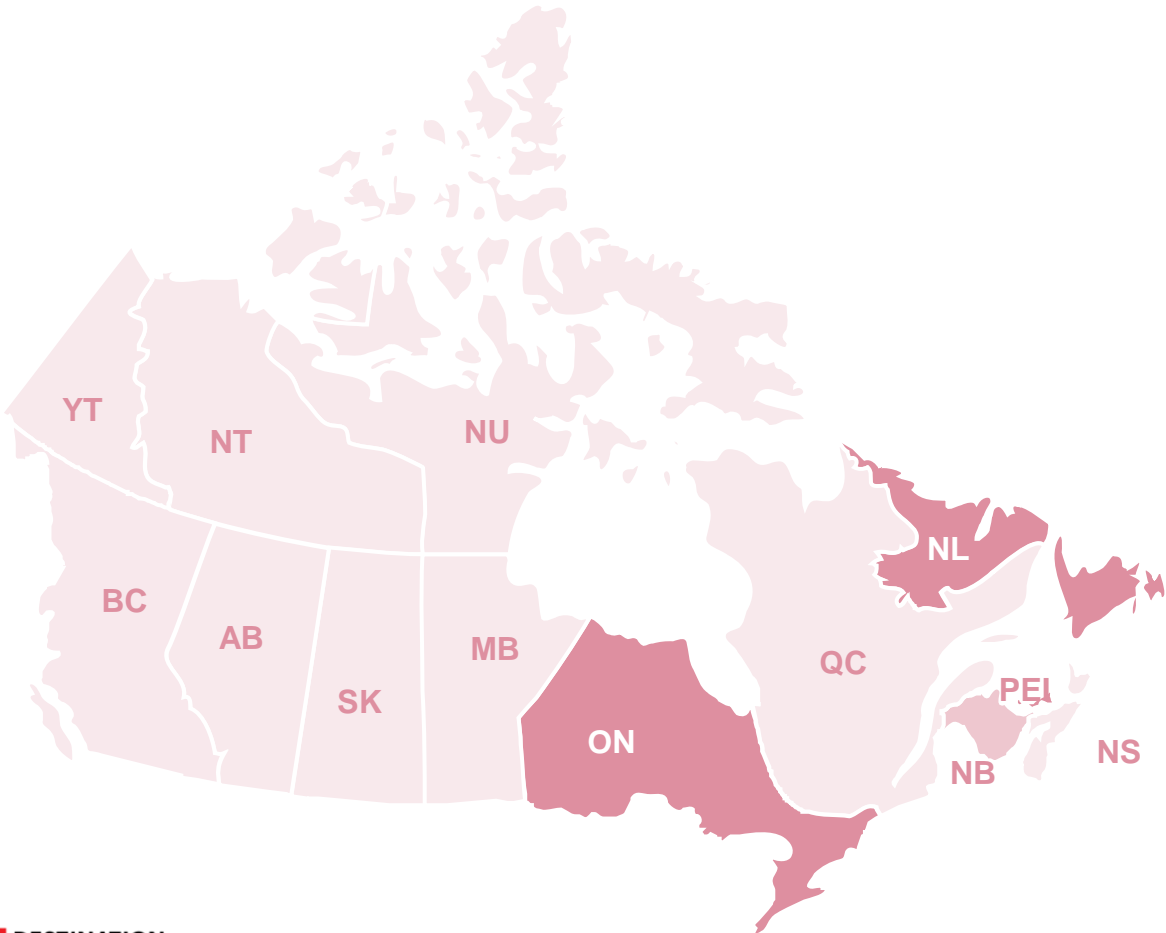
YELLOWKNIFE

NIAGARA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers

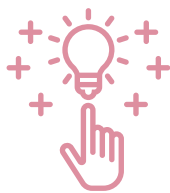
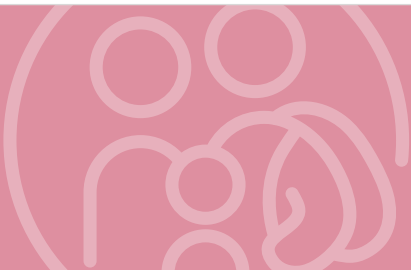


PROVINCES	%	INDEX
AB	18%	108
BC	26%	99
MB	0%	80
NB	5%	119
NL	9%	129
NS	0%	76
NT	10%	115
NU	0%	73
ON	40%	131
PEI	11%	129
QC	33%	90
SK	5%	109
YT	0%	54



PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- For those of us who have visited Canada, it has been in winter and summer months, aligned with the school calendar.
- We are familiar with Canada as a travel destination and may consider it for a future trip.



CANADA TRAVEL MONTHS ON A PAST TRIP

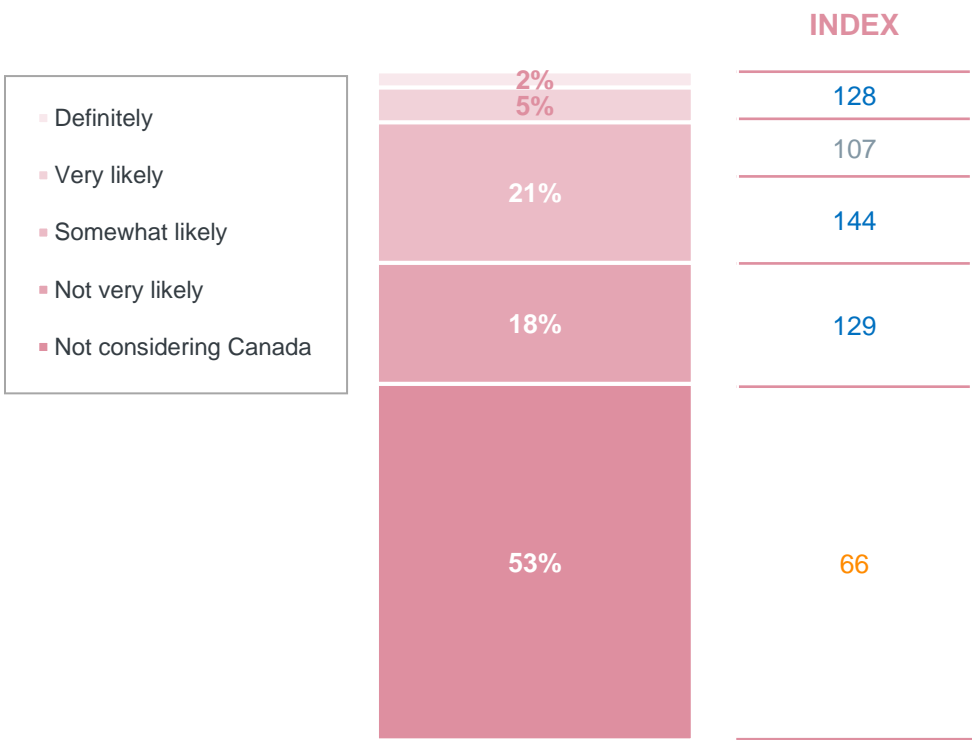
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	39%	17%	36%	35%
VS. TOTAL MARKET	18%	25%	37%	28%

9%

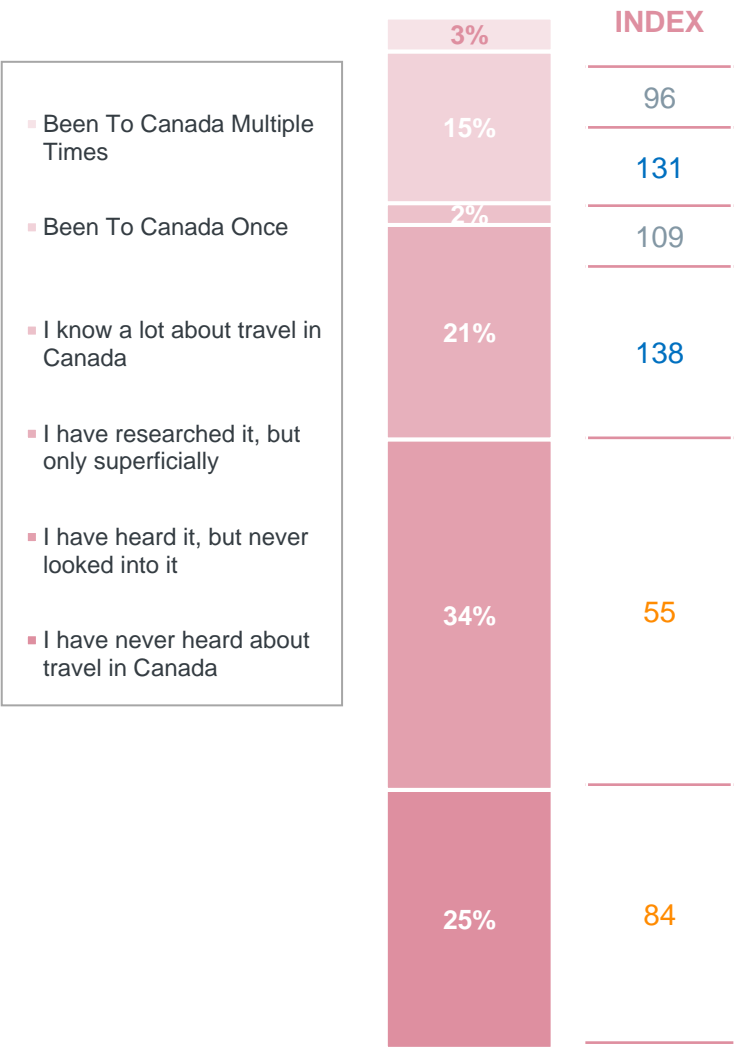
Been to Canada in last 5 years
138 INDEX SCORE



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

19%

Had a child

128 INDEX SCORE

24%

Started a new job / career

152 INDEX SCORE

20%

Bought a new home

153 INDEX SCORE

15%

Moved to a new city

114 INDEX SCORE

56%

Child started school

149 INDEX SCORE

52%

Purchased a car

147 INDEX SCORE

4%

Retired

68 INDEX SCORE

31%

Renovated house

127 INDEX SCORE



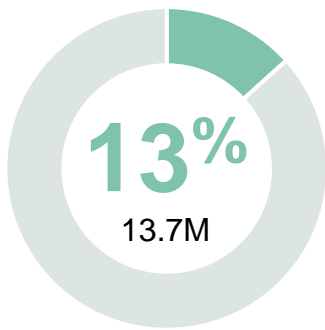
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	56%	141
Travel	52%	76
Personal care and wellness	51%	108
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	43%	61
Fashion and accessories	35%	126
Technology and gadgets	26%	147



CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN 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 culinary and 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

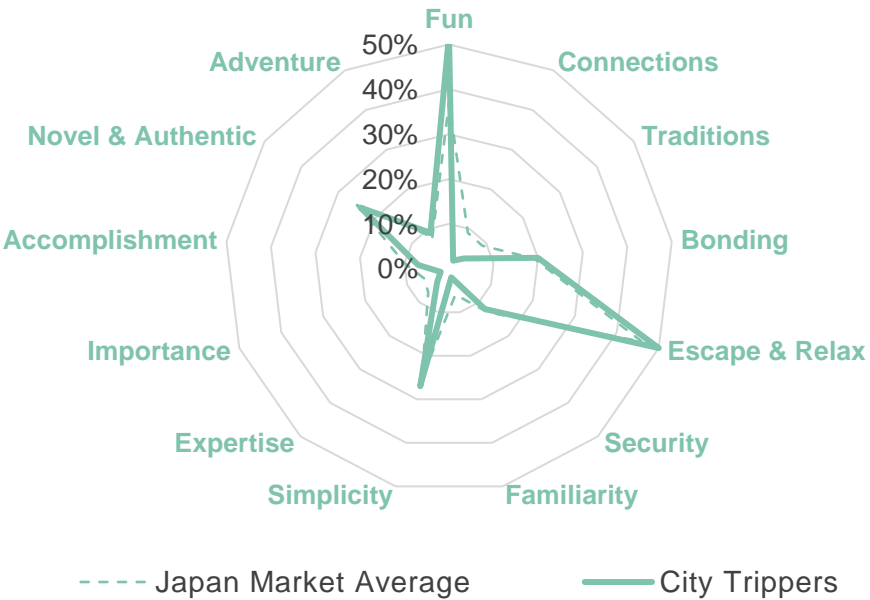
We prioritize fun and social settings and seek experiences that are worth sharing on social media.
- 2

We like to let loose, find adventure, and forget about the day to day. Popular and famous shopping options and culinary experience are both attractive.
- 3

We value simplicity in our travels, preferring destinations that are convenient to get to and are built for tourism. If we can save some money even better.
- 4

While we primarily travel as a couple or with friends, we sometimes slow down and travel with parents or extended family.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

78

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

81

How is this calculated?

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



CITY TRIPPERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



OVERALL INSIGHT

- We select destinations that offer a fun, social setting, allowing us to fully indulge and live in the moment.
- We seek experiences that we can be proud of, and that we look forward to sharing with others.
- We are attracted to trendy and established destinations that ensure planning is simple and straightforward.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally stick to the most popular areas when I visit somewhere	92%	126
I prefer destinations with lots of distractions and things to do	89%	135
Trying out local cuisine is a really important part of travel	89%	126
I prefer destinations with well-established tourist infrastructure	83%	124
I like natural attractions but I don't usually think they are the highlights of my trip	82%	125
I generally don't go out of my way to seek out perspectives from underrepresented communities	81%	123
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	81%	128
While travelling I generally stick to places that are direct and convenient to get to	78%	120
I prefer planning my trips independently and don't consult travel agencies	77%	122
I appreciate diversity but not likely engage deeply with Indigenous cultures	76%	122
I prefer traditional and well-known accommodation options when travelling	74%	117
I will generally not go out of my way to buy local when travelling	57%	124
I'm more interested in the present and don't focus much on the history of where I visit	39%	120



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	71%	129
To let loose and forget about day-to-day life	69%	116
To indulge myself and live in the moment	68%	140
To enjoy simple, straightforward travel	53%	109
To explore and discover new things / places	46%	114
To be proud to share my travel experiences	7%	131



DESIRED DESTINATION

	SCORE	INDEX
Fun	85%	140
Free-Spirited	54%	122
Carefree	49%	119
Open	31%	108
Trendy	18%	127
Practical	5%	103



CITY TRIPPERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

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



AGE

	SCORE	INDEX
18-34	28%	132
35-54	30%	99
55+	42%	91
MEAN YEARS	49.6	87



HH INCOME (CAD)

	SCORE	INDEX
\$45K or less	27%	128
>\$45K to \$100K	63%	68
More than \$100K	6%	75
Refused	5%	124



EMPLOYMENT

	SCORE	INDEX
Employed FT	34%	90
Employed PT	15%	130
Self-employed / Business owner	7%	84
Retired	11%	93



EDUCATION

	SCORE	INDEX
Primary education or less	2%	123
Secondary education	31%	118
Post-secondary education	67%	78



68%

92 Have a valid passport



GENDER

40%

75 Male

60%

125 Female

0%

120 Non-binary / Other



HOUSEHOLD

10%

94 Children <18 Living At Home*

17%

95 Children 18+ Living At Home*

22%

95 Children NOT Living At Home*

68%

111 No Children

* Option is not exclusive



JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	13%	88
Osaka	8%	94
Kanagawa	7%	74
Hokkaido	7%	124
Aichi	6%	84
Hyogo	5%	92

	SCORE	INDEX
Chiba	4%	83
Fukuoka	4%	125
Saitama	4%	72
Shizuoka	4%	117
Kyoto	3%	112



CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: NON-GROUP

81

TRAVEL TRADE INDEX: GROUP

100

KEY terminology on this page

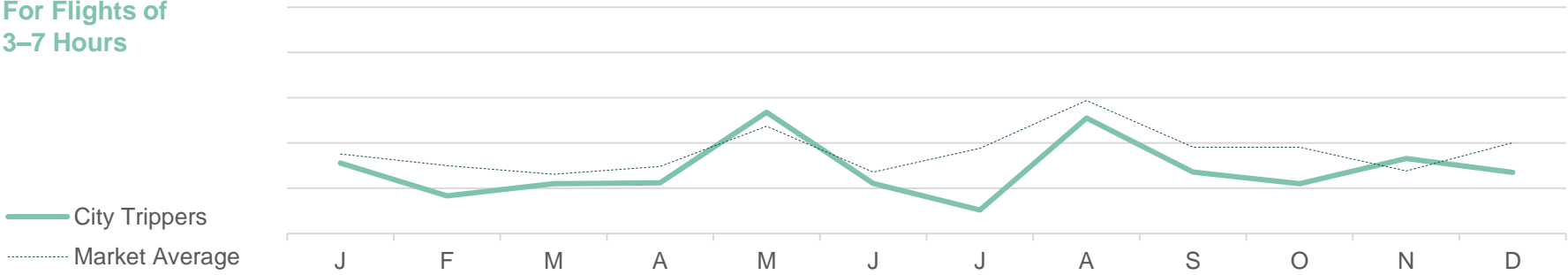
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).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

For additional definitions see [Glossary](#)

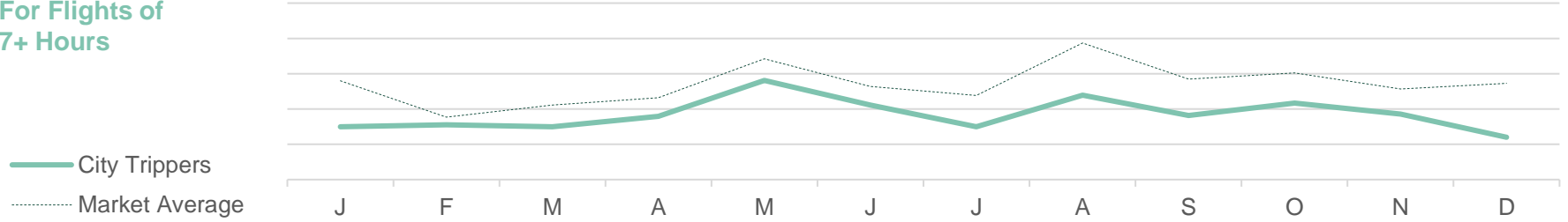


TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

INDEX

1-2 Days	44%	100
3-5 Days	12%	85
1 Week Holiday	2%	83
2 Weeks Holiday	1%	81
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	49%	100
International Leisure	4%	88
Business Trip	6%	84
Added Personal To Business	1%	77
Worked During Vacation	0%	74

Incidence is frequency of 2+ times per year



CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	79%	124
Budget Hotel	40%	120
Premium Hotel	17%	92
Friend's or family's place	11%	116
Bed & Breakfast	4%	93
Hostel	3%	96



THOUGHTS ON INDIGENOUS TRAVEL

24%

78 INDEX SCORE

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

7%

99 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	61%	80
You only ever get to know a country by experiencing its culture	38%	85
I'm willing to put in the effort while travelling in order to see lesser-known places	22%	80
I'm open to travelling to destinations with limited tourist infrastructure	18%	76
I'm open to visiting destinations with challenging climates or weather conditions	15%	85
I like to explore places that are off the beaten path and less explored	8%	74



CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

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



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	41%	82
Adult relatives	29%	132
Friends	19%	135
Solo	16%	96
Kids	7%	93



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$1,210

79
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	43%	76
It's important to me that I visit somewhere that is open to diversity	32%	80
I consider the impact that I personally have on the destinations I visit	26%	82
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	19%	72
Hearing from underrepresented communities is an important part of travelling	19%	77

16%

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, festivals, and events.
- Our larger travel groups with extended family are well suited to well-known attractions.



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Local cuisine	75%	114
○ Local restaurants	60%	118
○ Cafes or bakeries	35%	132
○ Street cuisine	32%	121
 Shopping	64%	133
○ Souvenir shopping	56%	134
○ Visiting famous shopping centres or areas	39%	134
 Cultural experiences or attractions	61%	100
○ Historical or archeological sites	49%	103
○ Observing architecture	32%	105
 Festivals and events	38%	126
○ Music concerts or festivals	23%	135
○ Cultural or traditional festivals	18%	110
 Family-focused attractions	35%	105
○ Amusement parks or theme parks	30%	106
○ Zoos or aquariums	25%	103
 Health and wellness	32%	103
 Overnight experiences	22%	86
 Nature experiences	17%	74
 Guided tours	12%	87
 Nightlife	8%	113
 Casual sports	5%	78
 Winter-based sports	5%	88



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 check off dream travel places	61%	135	55%	114
To relax and unwind	68%	106	85%	134
To escape from routine	53%	129	35%	98
To spend time with family	16%	75	19%	91
To have fun with friends	20%	132	20%	122
To have memories from top travel spots	8%	82	18%	107
For adventure and excitement	20%	102	21%	112
To learn through other cultures	13%	79	9%	63
To seek solitude and isolation	11%	98	9%	102



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	50%	117	52%	117
Partner / spouse wanted to go	24%	78	56%	112
Festival or event	47%	110	44%	114
Visiting friends / family	24%	98	27%	101
Special event (e.g., wedding, reunion)	13%	81	18%	85
Kids wanted to go	8%	87	18%	99

8% 94
INDEX SCORE

Travel aligns with
children’s school schedule

13% 92
INDEX SCORE

Take time off for vacation
during major holidays

25% 109
INDEX SCORE

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



CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN



OVERALL INSIGHT

- We book key elements at least four months in advance for longer distance trips, but will wait until 2 months before for shorter distance trips.

43%

Primary Trip Planner

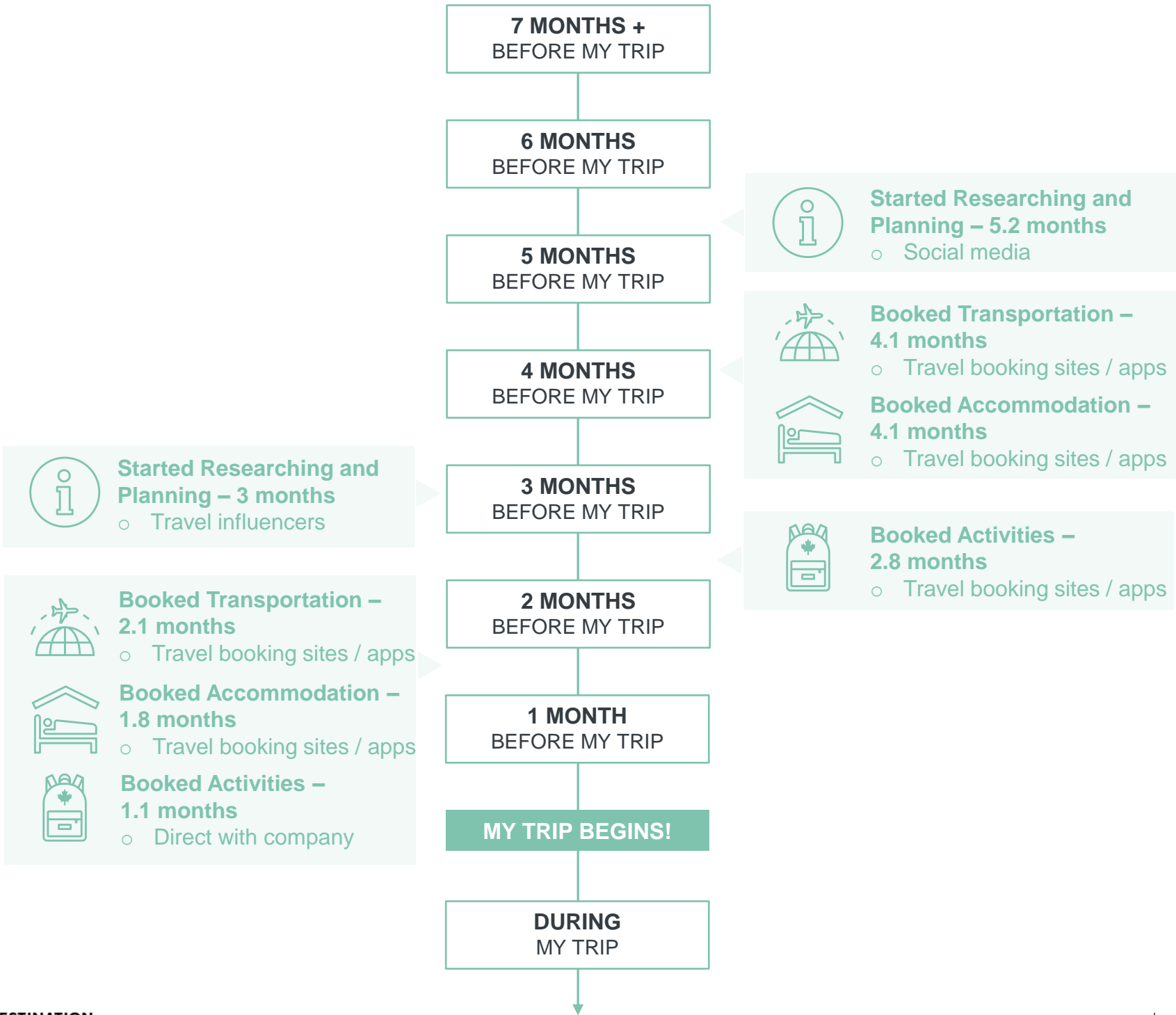
80 INDEX SCORE

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 explore cities with well-known attractions and events, often with friends.
- We also take trips like Simplicity Lovers or Culture Seekers.

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

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



TRIP TYPE	Urban Centre		
COMPANIONS	Alone		24%
	Couple only		23%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Souvenir shopping		49%
	Local restaurants		44%
	Visiting famous shopping centres		37%
KEY BEHAVIOURS	City trip to see some famous sites and take in a festival		



TRIP TYPE	Friends Trip		
DESTINATION TYPE	Urban centre		35%
	Small cities and town		16%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Local restaurants		49%
	Souvenir shopping		44%
	Street cuisine		19%
KEY BEHAVIOURS	All about having fun, letting loose, and indulging a little with friends		



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		41%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Souvenir shopping		36%
	Outdoor hot tub or bath		33%
	Local restaurants		30%
KEY BEHAVIOURS	Couples trips to relax and focus on wellness. Planned more last minute		



TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		27%
	Historical site		18%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Novel & Authentic
ACTIVITIES	Local restaurants		36%
	Historical or archeological sites		33%
	Religious buildings or sites		22%
KEY BEHAVIOURS	More focus on exploring new cultures and finding authentic experiences. Maybe staying with friends		



CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

- We seek trendy locations with ease of travel, where famous attractions, culinary experiences, and nightlife are abundant.
- Most of our travel explores East Asian and Pacific destinations.



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Japan	86%	120	Singapore	1%	95
US	4%	75	China	1%	84
South Korea	3%	97	Hong Kong	1%	94
Australia	2%	104	Philippines	1%	147
Italy	1%	86	France	1%	80



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	64%	121
Has famous attractions	54%	136
Is easy to travel to	44%	113
Renowned for food and drink experiences	41%	124
Has well-developed tourism infrastructure	35%	125
Is easy to travel around once there	23%	119
Provides a bustling and vibrant city vibe	14%	116
Is a trendy destination	14%	139



CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- We are unlikely to have visited Canada before.
- If we have been, it may have been to Quebec or Ontario.
- A future trip may explore Vancouver and more specifically, Whistler.



WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	12%	87
BC	16%	73
MB	0%	80
NB	4%	109
NL	2%	88
NS	4%	134
NT	0%	68
NU	2%	116
ON	28%	83
PEI	4%	86
QC	31%	81
SK	2%	91
YT	4%	99



CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- When we have visited, it has been primarily in the Spring and Summer seasons.
- Overall we do not know much about Canada has a travel destination.



CANADA TRAVEL MONTHS ON A PAST TRIP

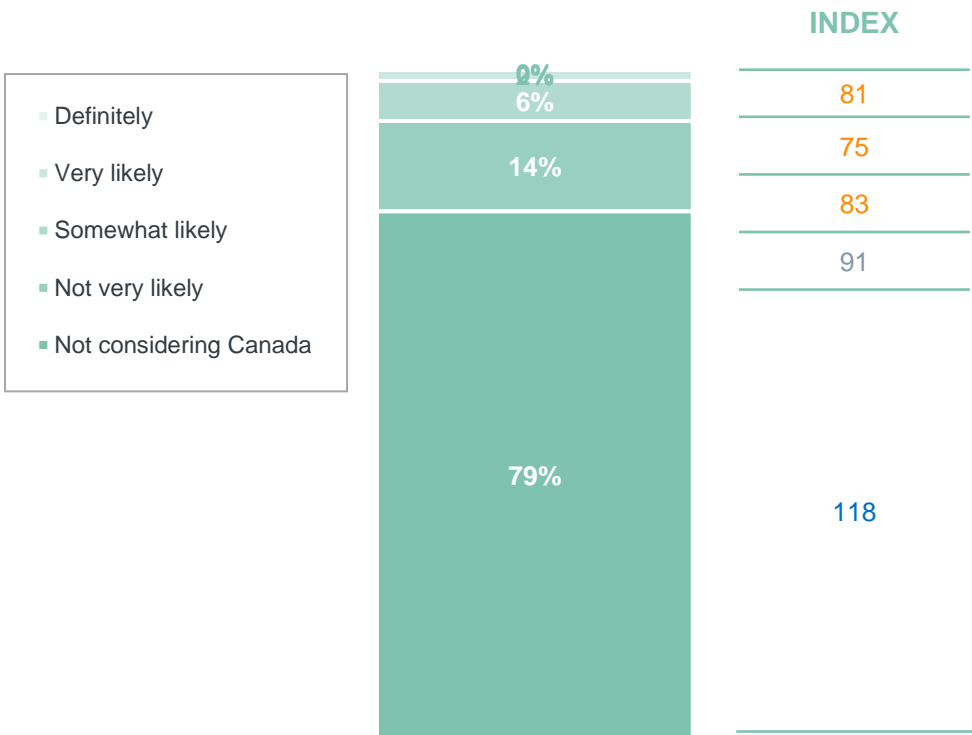
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	21%	30%	32%	23%
VS. TOTAL MARKET	18%	25%	37%	28%

2%

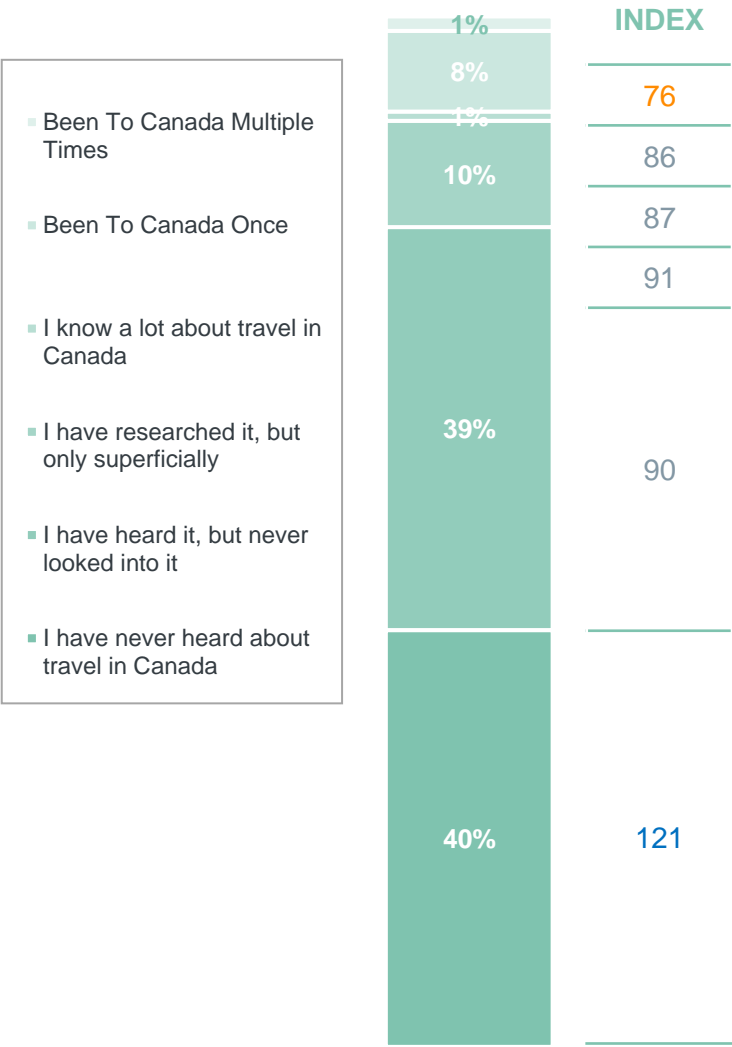
Been to Canada in last 5 years
82 INDEX SCORE



LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA





CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

- In recent years our primary activity has been leisure travel.
- After spending on travel, our next biggest priority is personal care and wellness expenses.



MAJOR LIFE EVENTS IN LAST 5 YEARS

1%

Had a child

95 INDEX SCORE

12%

Started a new job / career

93 INDEX SCORE

5%

Bought a new home

94 INDEX SCORE

13%

Moved to a new city

105 INDEX SCORE

6%

Child started school

94 INDEX SCORE

27%

Purchased a car

83 INDEX SCORE

9%

Retired

100 INDEX SCORE

16%

Renovated house

86 INDEX SCORE



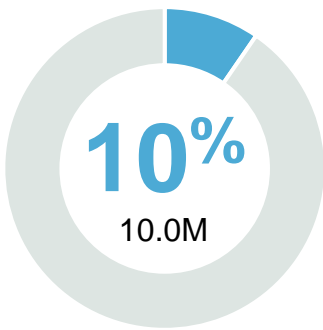
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	60%	119
Travel	55%	85
Personal care and wellness	50%	105
Savings and investments	38%	70
Fashion and accessories	34%	120
Experiences (e.g., concerts, events).	23%	124



SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN 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

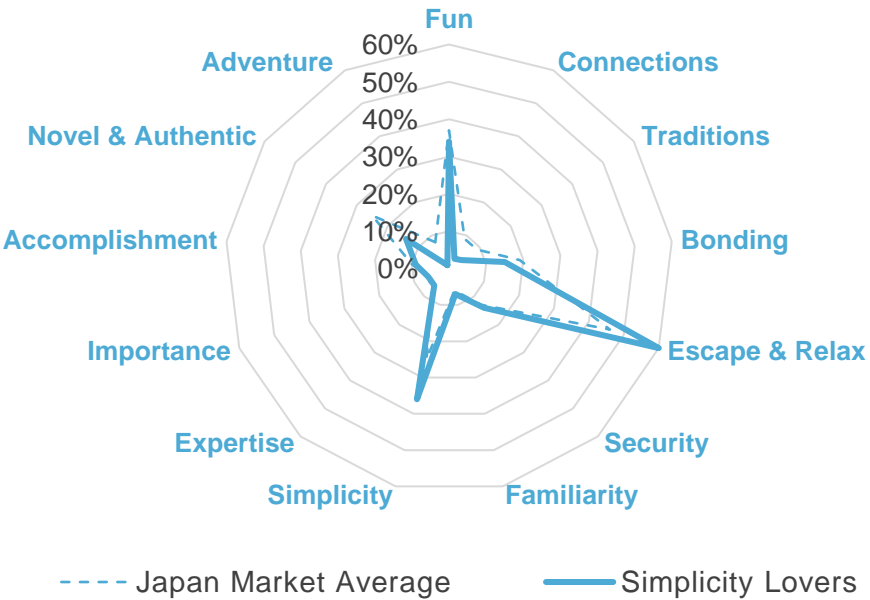
We seek peace, relaxation, and familiarity in our travels, preferring easy, affordable destinations offering a sense of safety.
- 2

We like to take it slow, with low impact activities. We do not 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 do not attract us, we do not want to worry about how to navigate once we arrive. Packaged vacations are attractive.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

77

How is this calculated?

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



TRAVELLER ECONOMIC INDEX

77

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, safe and practical destinations.
- Prioritizing simplicity and serenity, we favor understated locales, and don't see the value of posting our travels online.
- We do not feel the need to travel often, but when we do it needs to be easy, direct, and reliable.



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I don't see the point of posting about my trips on social media	90%	150
I generally avoid places that are challenging or difficult to reach	85%	130
Quiet, relaxed experiences are how I take care of myself on vacation	82%	153
I appreciate diversity but not likely engage deeply with Indigenous cultures	78%	125
I generally don't participate in physical activities during my holidays	75%	142
Generally I'm not influenced by what destinations are popular or trendy at the moment	62%	137
I seek out destinations that offer quiet opportunities for deep self-reflection	57%	140
It's not important to me that I come back from travels having learnt something new	57%	132
I don't consider travel to be an important milestone of growing up	55%	136
I generally prefer to go back to the same destinations on holiday	38%	149
I'm more interested in the present and don't focus much on the history of where I visit	38%	118
Local cuisine is not a priority for me; I focus on other aspects of travel	29%	126
I travel when I need to	14%	138



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To let loose and forget about day-to-day life	75%	128
To enjoy simple, straightforward travel	68%	139
To escape the demands of everyday life	58%	127
To find much-needed time to relax	53%	135
To be familiar with my surroundings	9%	135
To feel confident travel with no surprises	8%	149



DESIRED DESTINATION

	SCORE	INDEX
Relaxed	78%	145
Safe	67%	124
Carefree	52%	126
Peaceful	50%	143
Familiar	20%	140
Practical	7%	121



SIMPLICITY LOVERS

OUR DEMOGRAPHICS



OVERALL INSIGHT

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



AGE

	SCORE	INDEX
18-34	9%	60
35-54	24%	91
55+	67%	119
MEAN YEARS	58.4	123



HH INCOME (CAD)

	SCORE	INDEX
\$45K or less	26%	122
>\$45K to \$100K	64%	78
More than \$100K	6%	77
Refused	5%	119



EMPLOYMENT

	SCORE	INDEX
Employed FT	34%	89
Employed PT	13%	109
Self-employed / Business owner	10%	107
Retired	17%	116



EDUCATION

	SCORE	INDEX
Primary education or less	1%	95
Secondary education	33%	124
Post-secondary education	67%	76



60%
76 Have a valid passport



GENDER

49% 100 Male

51% 101 Female

0% 80 Non-binary / Other



HOUSEHOLD

7% 91 Children <18 Living At Home*

22% 116 Children 18+ Living At Home*

31% 116 Children NOT Living At Home*

63% 106 No Children

* Option is not exclusive



JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Tokyo	12%	81
Kanagawa	12%	132
Osaka	9%	102
Aichi	6%	89
Chiba	6%	128
Hyogo	6%	127

	SCORE	INDEX
Saitama	5%	92
Fukuoka	4%	114
Hokkaido	3%	85
Shizuoka	3%	102
Nagano	3%	126



SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS



TRAVEL TRADE INDEX: **NON-GROUP**

88

TRAVEL TRADE INDEX: **GROUP**

51

KEY terminology on this page

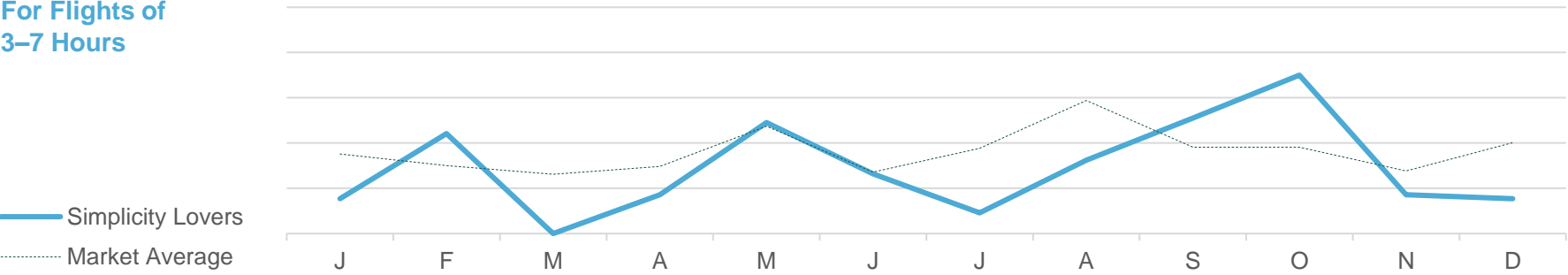
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).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

For additional definitions see [Glossary](#)

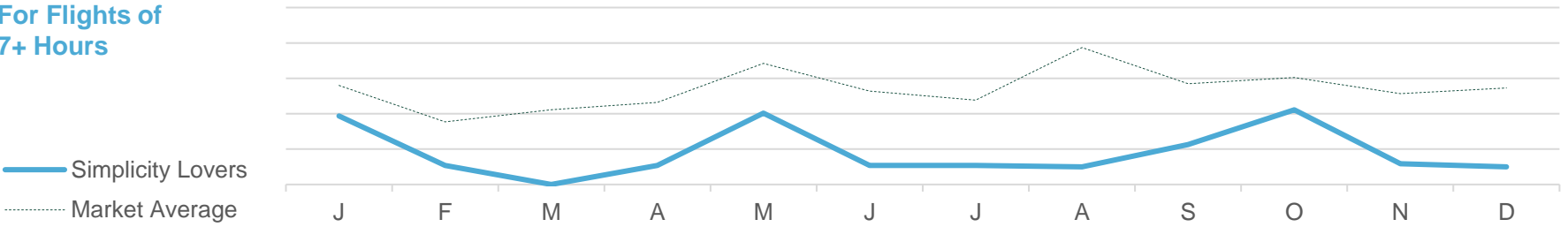


TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

INDEX

1-2 Days	35%	70
3-5 Days	8%	75
1 Week Holiday	1%	73
2 Weeks Holiday	0%	68
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	40%	73
International Leisure	1%	71
Business Trip	5%	78
Added Personal To Business	1%	68
Worked During Vacation	0%	70

Incidence is frequency of 2+ times per year



SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	77%	114
Budget Hotel	36%	112
Premium Hotel	12%	83
Friend's or family's place	10%	106
Bed & Breakfast	3%	86
Campsite	2%	94



THOUGHTS ON INDIGENOUS TRAVEL

22%

75 INDEX SCORE

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

2%

68 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	62%	82
You only ever get to know a country by experiencing its culture	31%	69
I'm open to travelling to destinations with limited tourist infrastructure	26%	93
I'm willing to put in the effort while travelling in order to see lesser-known places	26%	85
I like to explore places that are off the beaten path and less explored	24%	98
I'm open to visiting destinations with challenging climates or weather conditions	12%	77



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	58%	105
Adult relatives	23%	106
Solo	19%	102
Friends	10%	89
Kids	5%	92



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$1,110

75
INDEX SCORE

SPEND STYLE

Value / Affordable



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	51%	92
It's important to me that I visit somewhere that is open to diversity	34%	84
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	25%	85
I consider the impact that I personally have on the destinations I visit	22%	74
Hearing from underrepresented communities is an important part of travelling	19%	77

15%

PRIORITIZE SUSTAINABLE TRAVEL

75 INDEX SCORE

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

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



SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES















OVERALL INSIGHT

- Our top activities include dining and exploring cultural attractions. We also enjoy spas and saunas.
- We like to get outside for walks and appreciate being in nature.



TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
 Local cuisine	70%	102
○ Local restaurants	50%	94
○ Cooking lessons	18%	97
○ Cafes or bakeries	19%	77
 Cultural experiences or attractions	59%	96
○ Historical or archeological sites	49%	103
○ Museums	26%	91
 Health and wellness	38%	125
○ Outdoor hot tub or bath	37%	128
○ Sauna or steam bath	9%	109
 Nature experiences	32%	101
○ Nature walks	23%	114
○ Fall colours	18%	111
 Shopping	41%	87
○ Souvenir shopping	37%	93
○ Visiting famous shopping centres or areas	19%	79
 Overnight experiences	20%	80
 Family-focused attractions	19%	90
 Festivals and events	14%	66
 Guided tours	7%	69
 Casual sports	7%	93
 Water-based sports	3%	85
 Winter-based sports	3%	78



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%	137	72%	115
To escape from routine	56%	137	58%	147
To check off dream travel places	39%	86	44%	74
To spend time with family	35%	105	48%	116
To have fun with friends	18%	127	30%	145
To have memories from top travel spots	0%	58	5%	72
To seek solitude and isolation	8%	91	12%	120
For personal reflection and growth	13%	92	0%	65
To be pampered	9%	110	0%	75



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	30%	85	36%	87
Family / friends wanted to go	22%	76	37%	96
Festival or event	12%	50	5%	48
Visiting friends / family	4%	56	20%	89
Special event (e.g., wedding, reunion)	4%	67	12%	61
Kids wanted to go	14%	91	5%	91

3%

88
INDEX SCORE

Travel aligns with
children’s school schedule

5%

73
INDEX SCORE

Take time off for vacation
during major holidays

19%

86
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 do not need to book many items, as we are often driving distance and do not book activities.

47%

Primary Trip Planner

90 INDEX SCORE

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

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

FLIGHT OF
3–7 HOURS

FLIGHT OF
7+ HOURS

7 MONTHS +
BEFORE MY TRIP

6 MONTHS
BEFORE MY TRIP

5 MONTHS
BEFORE MY TRIP

4 MONTHS
BEFORE MY TRIP

3 MONTHS
BEFORE MY TRIP

2 MONTHS
BEFORE MY TRIP

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP

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

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



SIMPLICITY LOVERS

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

- Our top trips visit quiet and relaxing destinations where we can spend quality time.
- We sometime take busier group 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		41%
	Extended family		25%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Souvenir shopping		36%
	Outdoor hot tub or bath		33%
	Local restaurants		30%
KEY BEHAVIOURS	A budget friendly destination without crowds, where we can connect with extended family		



TRIP TYPE	Countryside & Village		
COMPANIONS	Couple only		43%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Novel & Authentic
ACTIVITIES	Souvenir shopping		43%
	Outdoor hot tub or bath		38%
	Nature walks		21%
KEY BEHAVIOURS	Couples trip to relax and unwind. Activities are low impact, sightseeing and shopping		



TRIP TYPE	Historical Site		
COMPANIONS	Couple only		48%
	Extended family		27%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Novel & Authentic
ACTIVITIES	Historical or archeological sites		70%
	Local restaurants		41%
	Observing architecture		37%
KEY BEHAVIOURS	Destination is selected for a specific attraction we want to cross off the list		



TRIP TYPE	Urban Centre		
COMPANIONS	Alone		24%
	Couple only		23%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Souvenir shopping		49%
	Local restaurants		44%
	Visiting famous shopping centres		37%
KEY BEHAVIOURS	Exploring a fun and trendy destination, trying local cuisine and seeing unique attractions		



SIMPLICITY LOVERS

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

- Our preferred destinations are affordable, accessible, not-too crowded, and have pleasant weather.
- We take shorter trips, mostly domestic, with rare trips to North America.



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Japan	87%	124	Australia	1%	76
US	6%	102	China	1%	84
South Korea	1%	70	Italy	1%	75
Thailand	1%	98	Switzerland	1%	120
UK	1%	93	France	0%	76



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Isn't too crowded	67%	147
Is not too expensive	66%	123
Is easy to travel to	54%	130
Doesn't take too long to get there	52%	136
Has a mild and pleasant climate	41%	146
Provides a sense of personal safety	41%	141
Is easy to travel around once there	29%	135
Has a small town feel	18%	129



SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

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

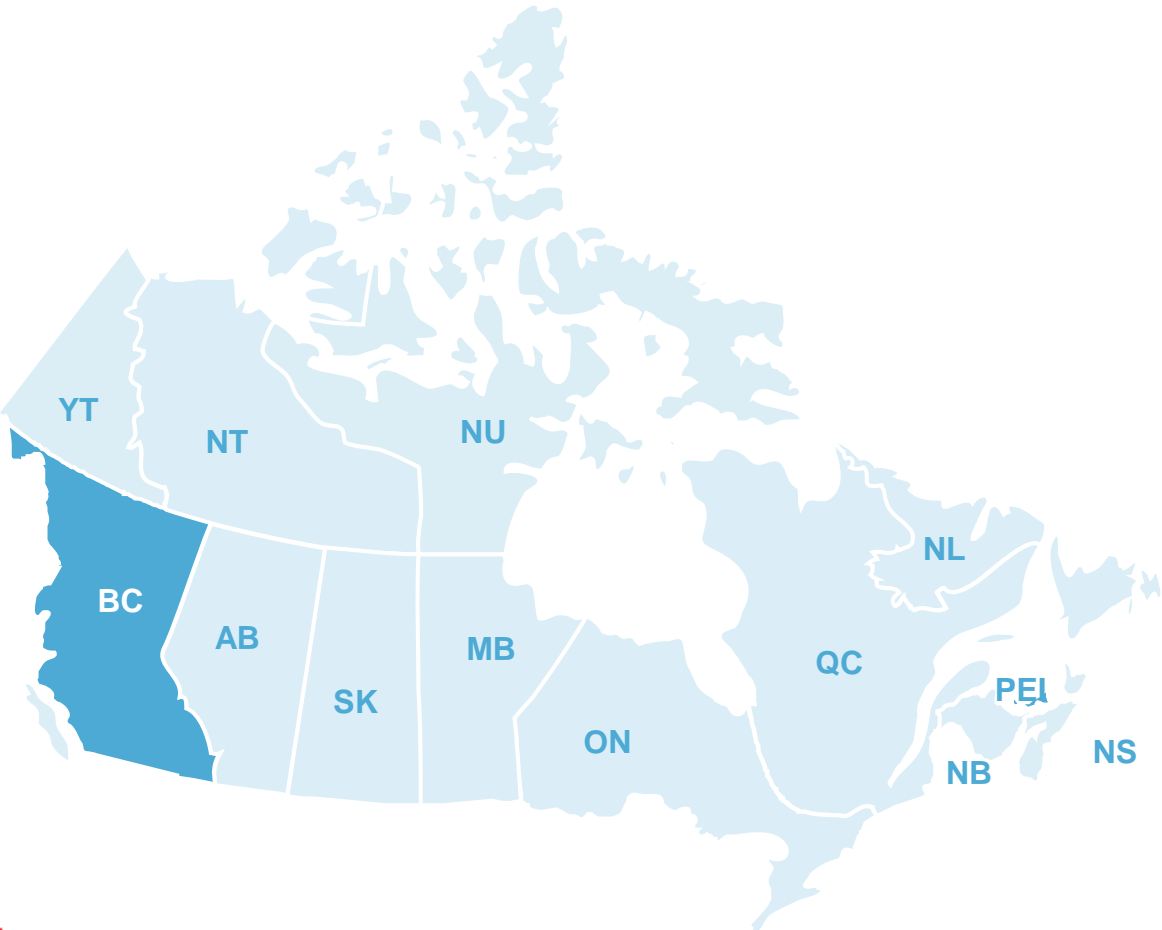


WHERE DO WE WANT TO GO IN CANADA



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	11%	83
BC	38%	134
MB	0%	80
NB	0%	64
NL	0%	78
NS	0%	76
NT	4%	85
NU	0%	73
ON	35%	111
PEI	10%	126
QC	33%	86
SK	0%	82
YT	4%	95



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

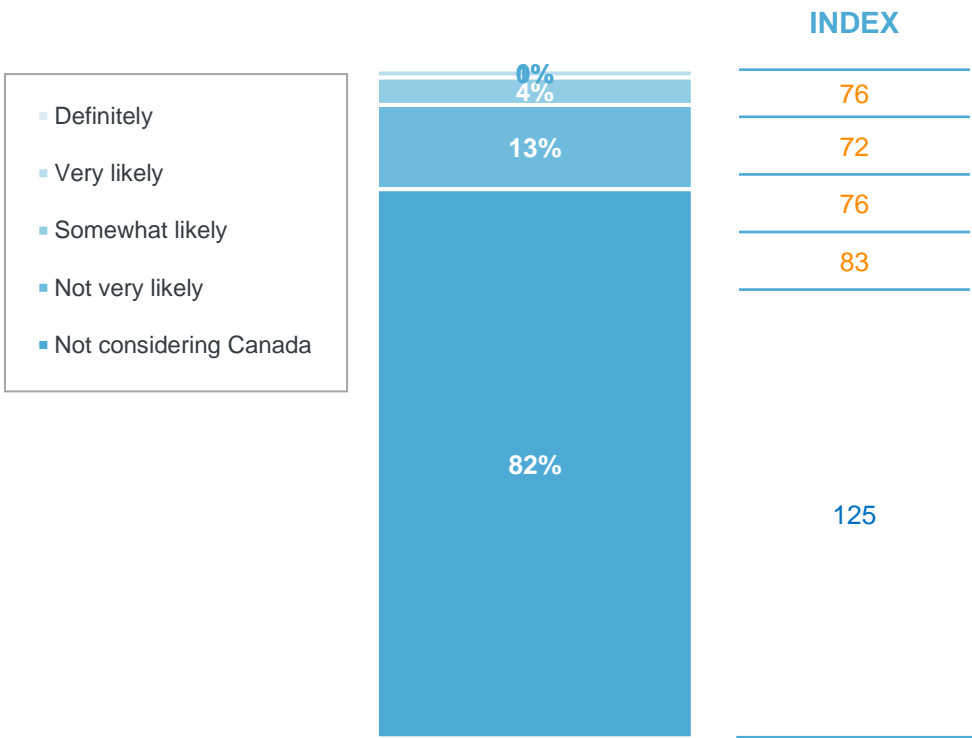
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	7%	33%	51%	21%
VS. TOTAL MARKET	18%	25%	37%	28%

0%

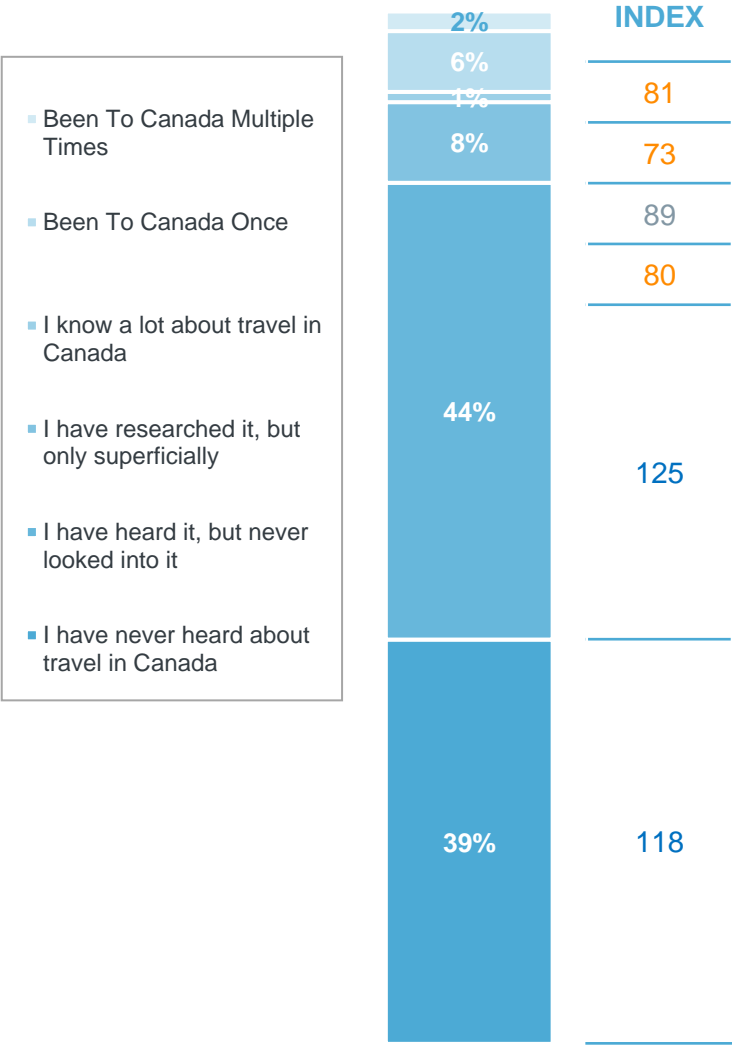
Been to Canada in last 5 years
72 INDEX SCORE



LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



FAMILIARITY WITH CANADA





SIMPLICITY LOVERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



OVERALL INSIGHT

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



MAJOR LIFE EVENTS IN LAST 5 YEARS

0%

Had a child

92 INDEX SCORE

15%

Started a new job / career

106 INDEX SCORE

5%

Bought a new home

90 INDEX SCORE

10%

Moved to a new city

84 INDEX SCORE

5%

Child started school

92 INDEX SCORE

29%

Purchased a car

87 INDEX SCORE

11%

Retired

120 INDEX SCORE

17%

Renovated house

87 INDEX SCORE



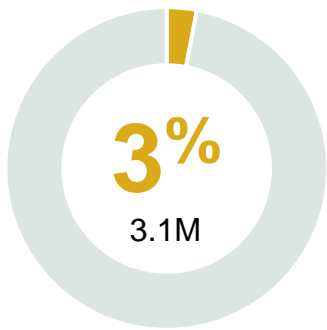
NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	62%	101
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	53%	95
Personal care and wellness	52%	112
Savings and investments	51%	121
Fashion and accessories	22%	79
Home and decor	19%	111



FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



% OF JAPAN POPULATION

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

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

WHAT YOU NEED TO KNOW ABOUT ME

- 1

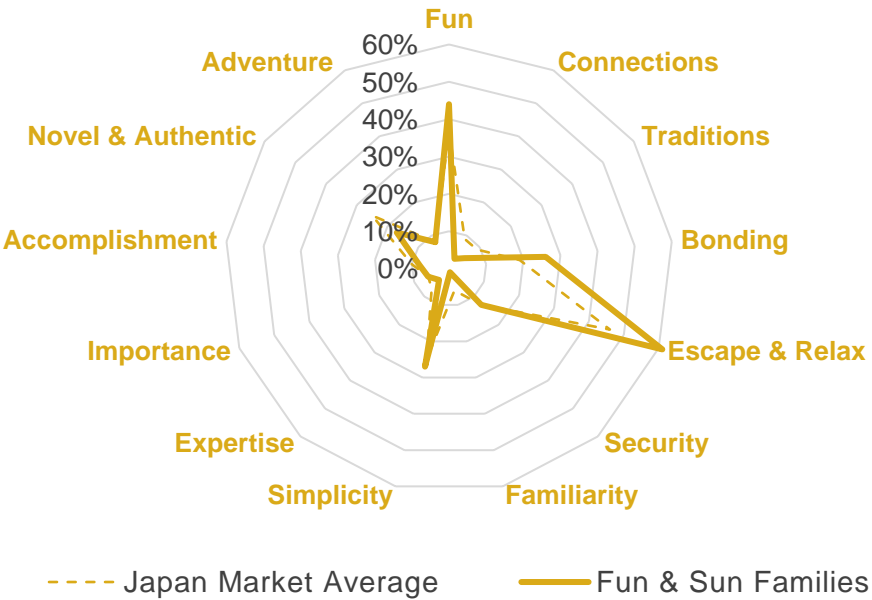
We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences.
- 2

Our trips are escapes from everyday life, focusing on creating lasting memories through both new and traditional activities.
- 3

We plan our annual vacation a few months in advance, sticking to familiar and reliable destinations.
- 4

While we generally prefer to stay in our comfort zone, we are excited to explore local shopping and cuisine when we travel.

EMOTIONAL TRAVEL MOTIVATIONS MAP



TRAVELLER RESPONSIBLE INDEX

79

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

86

How is this calculated?

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



FUN & SUN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES



OVERALL INSIGHT

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



TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally only choose destinations with comfortable climate and weather conditions	90%	127
I generally don't seek out destinations in order to explore my ancestral heritage	86%	126
While travelling I generally stick to places that are direct and convenient to get to	85%	130
I generally avoid places that are challenging or difficult to reach	82%	126
I prefer destinations with well-established tourist infrastructure	80%	118
I prefer destinations with lots of distractions and things to do	79%	119
I don't consider diversity factors when choosing travel destinations	73%	126
You can get to know a country without experiencing its culture	66%	124
I generally don't try to learn local languages	60%	127
I tend to choose a destination to visit based off value for money	59%	145
I will generally not go out of my way to buy local when travelling	59%	127
I'm more interested in the present and don't focus much on the history of where I visit	48%	137
I love posting my trips on social media to share with friends	37%	125



EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	75%	136
To let loose and forget about day-to-day life	73%	125
To escape the demands of everyday life	65%	141
To find much-needed time to relax	51%	129
To share quality time with others	28%	117
To bond through shared experiences	24%	129



DESIRED DESTINATION

	SCORE	INDEX
Fun	76%	126
Safe	67%	123
Relaxed	66%	125
Carefree	51%	123
Peaceful	43%	129
Trendy	20%	135



FUN & SUN FAMILIES

OUR DEMOGRAPHICS



OVERALL INSIGHT

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



AGE

	SCORE	INDEX
18-34	24%	117
35-54	67%	147
55+	9%	54
MEAN YEARS	41.5	54



HH INCOME (CAD)

	SCORE	INDEX
\$45K or less	18%	86
>\$45K to \$100K	70%	131
More than \$100K	7%	88
Refused	5%	131



EMPLOYMENT

	SCORE	INDEX
Employed FT	60%	139
Employed PT	13%	110
Self-employed / Business owner	6%	72
Retired	2%	60



EDUCATION

	SCORE	INDEX
Primary education or less	2%	110
Secondary education	22%	84
Post-secondary education	76%	115



53%

60 Have a valid passport



GENDER

43%

83 Male

57%

117 Female

0%

80 Non-binary / Other



HOUSEHOLD

88%

148 Children <18 Living At Home*

9%

58 Children 18+ Living At Home*

6%

58 Children NOT Living At Home*

6%

52 No Children

* Option is not exclusive



JAPAN PREFECTURE BREAKOUT

	SCORE	INDEX
Hokkaido	9%	145
Tokyo	9%	59
Osaka	8%	83
Saitama	8%	148
Aichi	7%	104
Kanagawa	7%	66

	SCORE	INDEX
Nagasaki	5%	163
Chiba	4%	75
Hyogo	4%	75
Fukuoka	3%	89
Miyagi	3%	135



FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS



TRAVEL TRADE INDEX: NON-GROUP

153

TRAVEL TRADE INDEX: GROUP

98

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).
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For additional definitions see [Glossary](#)



TYPICAL TRAVEL MONTHS

For Flights of
3–7 Hours

*Base size is too small to report

For Flights of
7+ Hours

*Base size is too small to report



TRIP DURATION

INDEX

1-2 Days	36%	73
3-5 Days	6%	68
1 Week Holiday	1%	76
2 Weeks Holiday	1%	100
3 Weeks Or More	0%	83

Incidence is frequency of 2+ times per year



TRIP TYPE

INDEX

Domestic Leisure	38%	67
International Leisure	0%	67
Business Trip	5%	81
Added Personal To Business	4%	104
Worked During Vacation	3%	114

Incidence is frequency of 2+ times per year



FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS



TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	79%	125
Budget Hotel	44%	128
Friend's or family's place	11%	118
Premium Hotel	11%	79
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	7%	142
All-inclusive resort	3%	109



THOUGHTS ON INDIGENOUS TRAVEL

27%

82 INDEX SCORE

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

1%

62 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	52%	63
You only ever get to know a country by experiencing its culture	34%	76
I'm open to travelling to destinations with limited tourist infrastructure	20%	82
I'm willing to put in the effort while travelling in order to see lesser-known places	15%	70
I like to explore places that are off the beaten path and less explored	12%	80
I'm open to visiting destinations with challenging climates or weather conditions	10%	73



FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE



OVERALL INSIGHT

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



TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	86%	143
Kids	80%	148
Adult relatives	16%	68
Solo	4%	67
Other	4%	113



BUDGET

AVERAGE SPEND (ALL TRIPS)

\$1,390

87
INDEX SCORE

SPEND STYLE

Value / Affordable



OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	41%	73
I consider the impact that I personally have on the destinations I visit	28%	85
It's important to me that I visit somewhere that is open to diversity	27%	74
Hearing from underrepresented communities is an important part of travelling	27%	90
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	22%	78

19%

PRIORITIZE SUSTAINABLE TRAVEL

83 INDEX SCORE

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

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



FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES















OVERALL INSIGHT

- Family focussed attractions are the #1 priority.
- We like to explore local cuisine and shopping, and often seek out spas or other wellness opportunities.



TOP DESIRED TRAVEL ACTIVITIES

		SCORE	INDEX
	Family-focused attractions	88%	153
	○ Amusement parks or theme parks	82%	154
	○ Zoos or aquariums	72%	152
	○ Space or science centres	25%	145
	Shopping	56%	118
	○ Souvenir shopping	48%	118
	○ Visiting famous shopping centres or areas	35%	124
	Health and wellness	41%	139
	○ Outdoor hot tub or bath	39%	136
	○ Spas	10%	104
	Water-based sports	8%	118
	○ Swimming	3%	127
	○ Scuba diving or snorkeling	3%	104
	Local cuisine	67%	96
	○ Local restaurants	49%	92
	○ Street cuisine	31%	116
	Cultural experiences or attractions	42%	58
	Nature experiences	34%	104
	Festivals and events	25%	94
	Overnight experiences	15%	63
	Guided tours	9%	77
	Winter-based sports	6%	100
	Casual sports	3%	66



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	52%	132	100%	161
To relax and unwind	88%	139	65%	105
To escape from routine	52%	129	45%	120
To check off dream travel places	24%	54	38%	54
To have memories from top travel spots	22%	127	35%	153
For adventure and excitement	26%	112	17%	99
To have fun with friends	0%	73	0%	77
For a romantic getaway	12%	85	0%	67
For personal reflection and growth	12%	92	0%	65



EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	100%	153	100%	155
Partner / spouse wanted to go	76%	147	83%	145
Family / friends wanted to go	53%	120	18%	71
Festival or event	37%	93	17%	69
Special event (e.g., wedding, reunion)	41%	124	17%	79
Visiting friends / family	12%	74	0%	58

36% 136
INDEX SCORE

Travel aligns with
children’s school schedule

19% 109
INDEX SCORE

Take time off for vacation
during major holidays

33% 137
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 in advance and secure accommodation early. Destinations are often selected at our kids requests.

37%

Primary Trip Planner

63 INDEX SCORE

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

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

FLIGHT OF
3–7 HOURS

FLIGHT OF
7+ HOURS

7 MONTHS +
BEFORE MY TRIP

6 MONTHS
BEFORE MY TRIP

5 MONTHS
BEFORE MY TRIP

4 MONTHS
BEFORE MY TRIP

3 MONTHS
BEFORE MY TRIP

2 MONTHS
BEFORE MY TRIP

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP

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

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




FUN & SUN FAMILIES

OUR BEHAVIOURS – TRIP TYPES



OVERALL INSIGHT

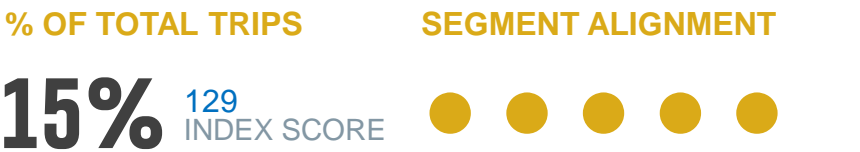
- Our top trips primarily feature destinations known for family attractions.
- We also take some trips like Simplicity Lovers.

 **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	Urban Centre		
COMPANIONS	Nuclear family with kids		58%
	Extended family		18%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Souvenir shopping		50%
	Amusement parks or theme parks		47%
	Local restaurants		46%
KEY BEHAVIOURS	Destination with a specific attraction for the kids. Saving on accommodation and spending on fun		



TRIP TYPE	Suburban Experience		
COMPANIONS	Nuclear family with kids		74%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Souvenir shopping		49%
	Amusement parks or theme parks		37%
	Staying at resort or cabin		12%
KEY BEHAVIOURS	Family trip to less tourism focussed destination. Maybe trying alternative accommodation		



TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		95%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Zoos or aquariums		43%
	Oceanside beaches		39%
	Other water-based sports		19%
KEY BEHAVIOURS	Family trip planned well in advance. Spending more for the resort experience		



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		41%
	Extended family		25%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Simplicity	Fun
ACTIVITIES	Souvenir shopping		36%
	Outdoor hot tub or bath		33%
	Local restaurants		30%
KEY BEHAVIOURS	Quick and easy travel to a quiet destination to spend time together as a couple		



FUN & SUN FAMILIES

OUR BEHAVIOURS – WHERE WE GO



OVERALL INSIGHT

- Our preferred destinations are kid-friendly, easy to access, and have affordable options.
- We take shorter trips, mostly domestic.



WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
Japan	90%	131	Guam	1%	140
US	5%	87	France	1%	100
South Korea	2%	81	Italy	1%	89
Spain	1%	142	China	1%	81
Australia	1%	82	Canada	1%	109



WHERE DO WE WANT TO GO



DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	91%	148
Is not too expensive	67%	124
Is easy to travel to	51%	126
Has famous attractions	45%	118
Doesn't take too long to get there	41%	118
Language is not a barrier	22%	128
Good connectivity (Wi-Fi, cell service, etc.)	22%	134
Is a trendy destination	11%	124



FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA



OVERALL INSIGHT

- We likely have not been to Canada before, and do not know a lot about Canada as a travel destination.
- To date, any travel to Canada has primarily been to British Columbia or Quebec.



WHERE DO WE WANT TO GO IN CANADA

QUEBEC

OTTAWA

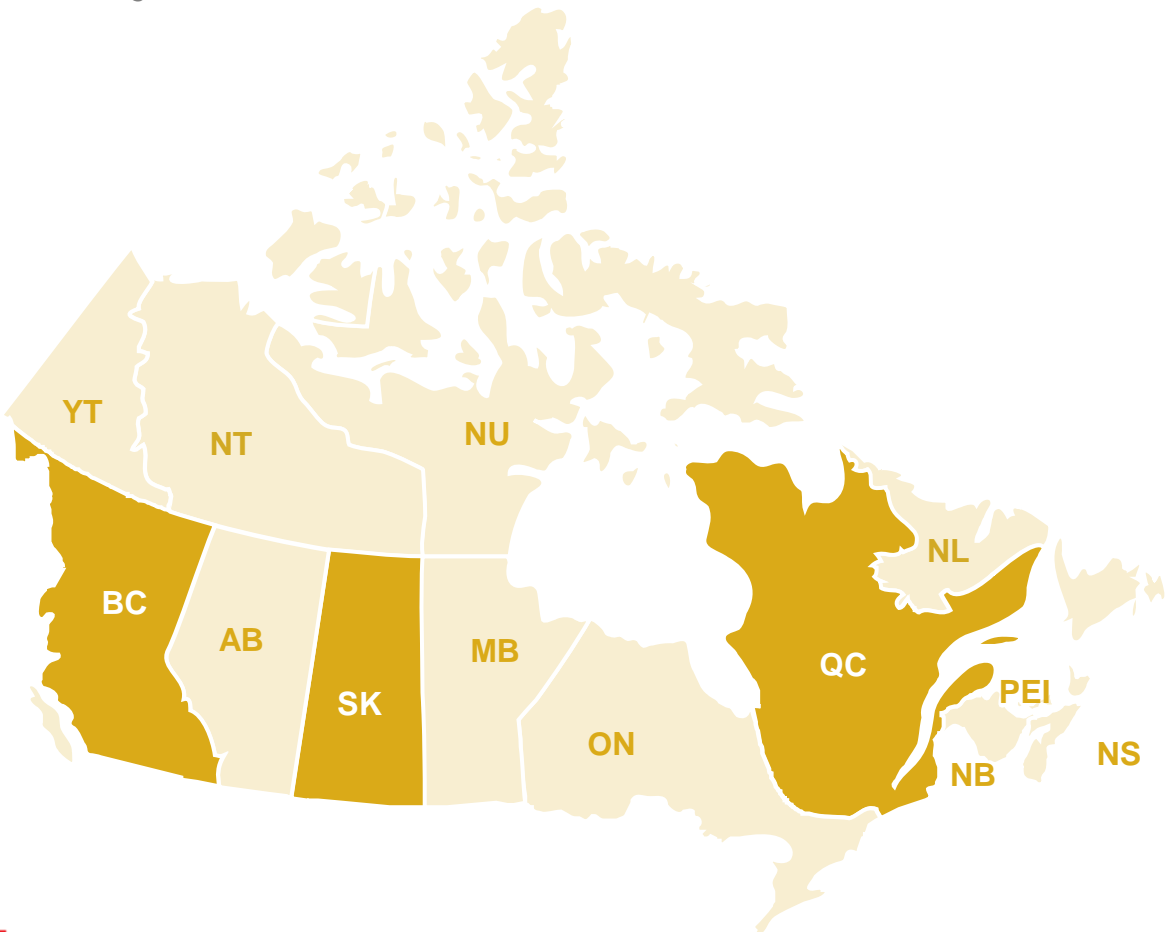
TORONTO

VANCOUVER ROCKY MOUNTAINS



PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	0%	44
BC	37%	130
MB	0%	80
NB	0%	64
NL	0%	78
NS	0%	76
NT	0%	68
NU	0%	73
ON	23%	62
PEI	0%	56
QC	48%	152
SK	12%	148
YT	0%	54



FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



OVERALL INSIGHT

- If we have visited Canada before, it has been in a variety of seasons.
- Generally, we are not planning a future visit.



CANADA TRAVEL MONTHS ON A PAST TRIP

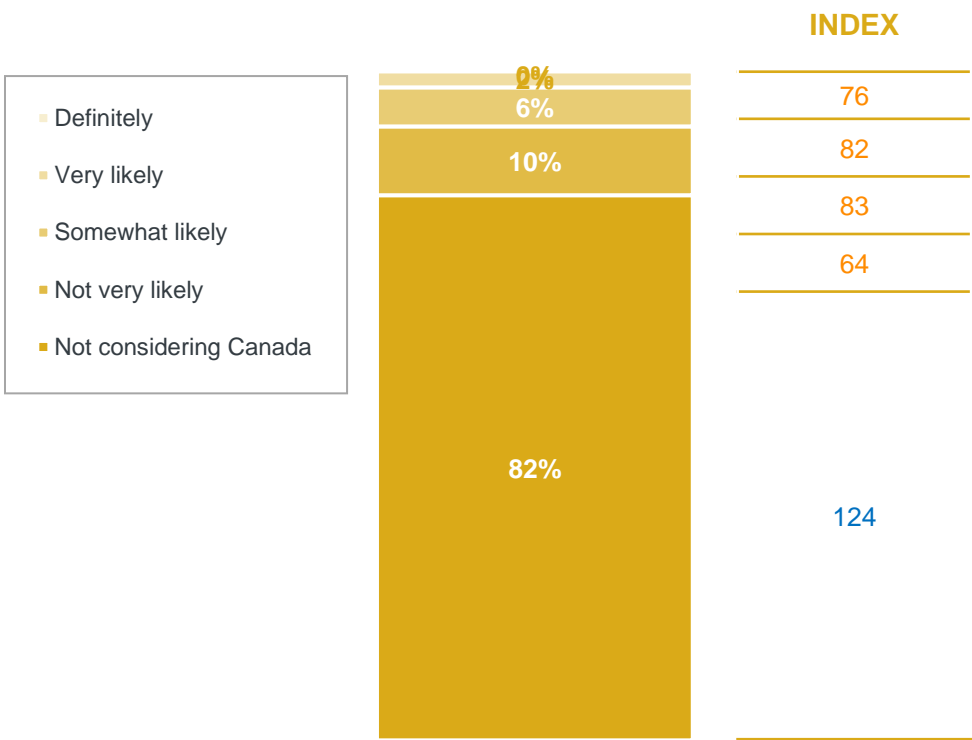
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	36%	50%	35%	10%
VS. TOTAL MARKET	18%	25%	37%	28%

2%

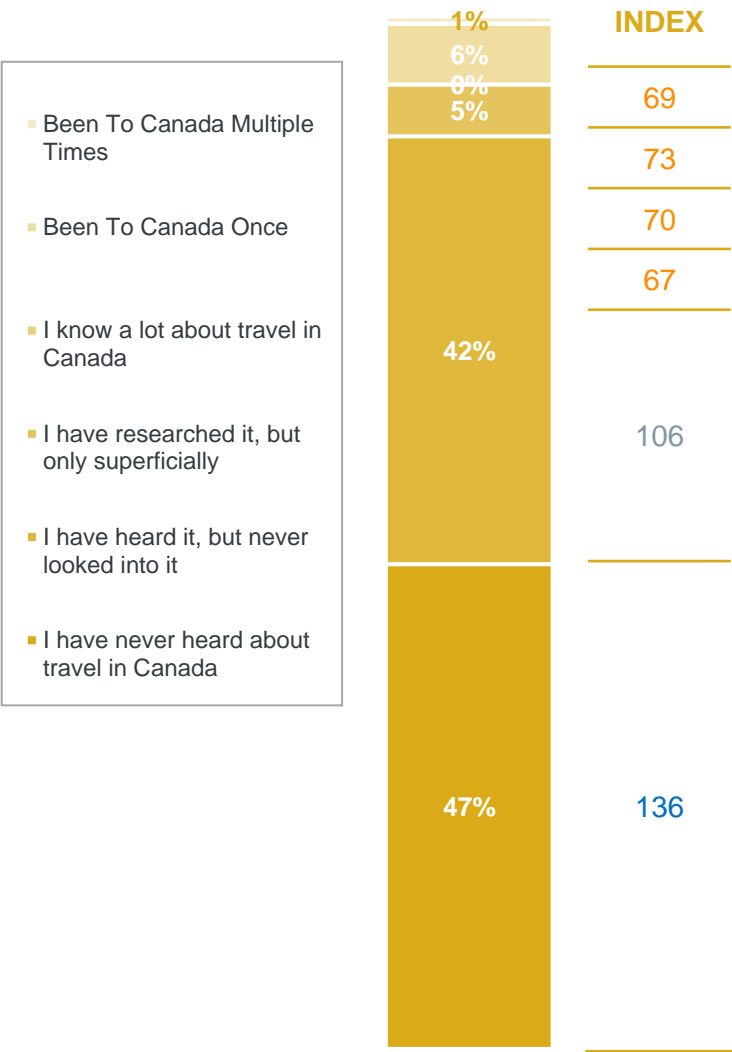
Been to Canada in last 5 years
88 INDEX SCORE



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 did not just have a child, our young children are transitioning from daycare to school life.



MAJOR LIFE EVENTS IN LAST 5 YEARS

35%

Had a child
158 INDEX SCORE

17%

Started a new job / career
120 INDEX SCORE

16%

Bought a new home
136 INDEX SCORE

22%

Moved to a new city
154 INDEX SCORE

50%

Child started school
143 INDEX SCORE

47%

Purchased a car
133 INDEX SCORE

3%

Retired
60 INDEX SCORE

9%

Renovated house
64 INDEX SCORE



NON-ESSENTIAL SPENDING PRIORITIES

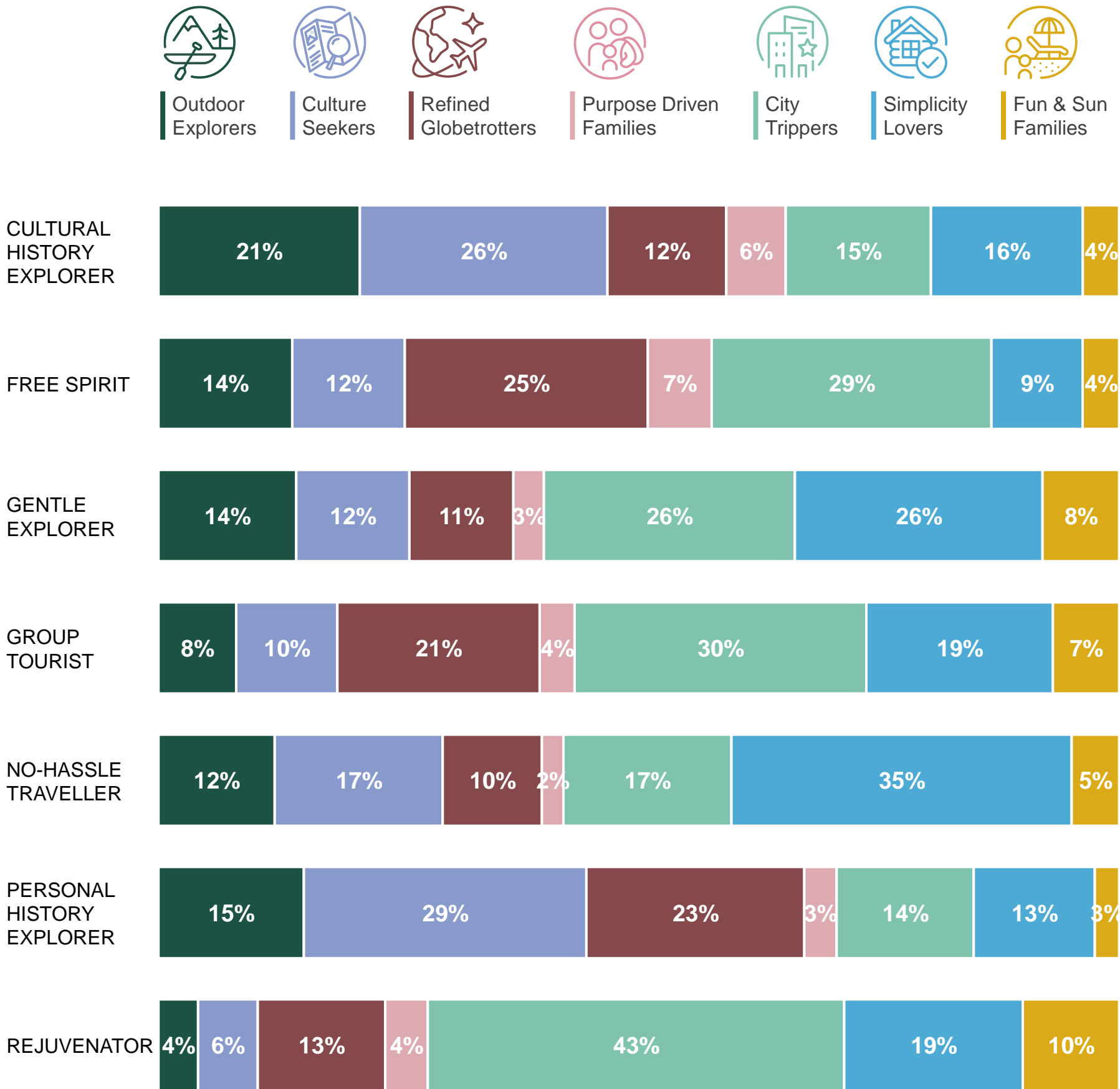
	SCORE	INDEX
Personal care and wellness	60%	147
Savings and investments	54%	132
Travel	45%	58
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	42%	58
Fashion and accessories	40%	141
Home and decor	24%	147



EXPLORER QUOTIENT MAPPING

MARKET LEVEL SEGMENT DISTRIBUTION ACROSS EQ SEGMENTS

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





GLOSSARY

DETAILS AND DEFINITIONS

DESIRED DESTINATION	How a traveller describes the personality of an ideal destination.	
DESTINATION CANADA PRIORITY SEGMENT	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	Key travel motivations derived from factor analysis, which condensed 25 initial statements into 13 primary motivations. These insights help industry researchers and marketers better understand travellers' emotional drivers, which may influence overall travel behaviours including the choice of destination, activities, and experiences during the journey	
EMOTIONAL TRAVEL MOTIVATION: ACCOMPLISHMENT	This travel motivation is about achieving personal goals and overcoming challenges during travel. These travellers seek destinations and activities that promote self-discovery and personal growth, pushing their limits to feel a sense of accomplishment.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • To feel like I've accomplished something. • To push my limits and challenge myself.
EMOTIONAL TRAVEL MOTIVATION: ADVENTURE	This travel motivation is about seeking thrill and excitement through adventurous activities. Travellers who seek adventure are often energized by a physical and emotional rush and they often proudly share their experiences with others.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • To have experiences I am proud to tell others about. • To feel a sense of adventure.
EMOTIONAL TRAVEL MOTIVATION: BONDING	This travel motivation focuses on spending quality time with travel companions, particularly partners and family members. Travellers motivated by bonding cherish creating lasting memories through shared experiences with their loved ones.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • To share quality time with others. • To bond and create lasting memories through shared experiences.
EMOTIONAL TRAVEL MOTIVATION: CONNECTIONS	This travel motivation is about building relationships and forming connections with new and interesting people. Travellers motivated by connections look for opportunities to engage with locals or other visitors on their travels.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • To feel connected with new people.
EMOTIONAL TRAVEL MOTIVATION: ESCAPE & RELAX	This travel motivation signifies a desire to escape daily routines and simply relax during vacation. Travellers motivated by escape and relax often seek solitude, tranquility, and rejuvenation in peaceful destinations.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> • To escape the demands of everyday life. • To find much-needed time to relax. • To let loose and forget about day-to-day life.



GLOSSARY

DETAILS AND DEFINITIONS

EMOTIONAL TRAVEL MOTIVATION: EXPERTISE	This travel motivation is about influence, status, and confidence. Travellers with this motivation like to be well versed in travel opportunities, so they can confidently navigate new environments, and take pride in being the expert among their peers	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> • To feel like a travel expert.
EMOTIONAL TRAVEL MOTIVATION: FAMILIARITY	This travel motivation encompasses a diverse range of travellers looking for familiarity during their travels. Some seek the comfort of recognizable destinations and routines, enjoying the predictability of repeat travel. Others aim to immerse themselves in new places while feeling like they are not tourists, blending in and experiencing the local culture as if they were natives.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> • To be familiar with my surroundings. • To feel like a local.
EMOTIONAL TRAVEL MOTIVATION: FUN	This travel motivation is centered around the pure enjoyment of travel. The travellers motivated by fun prioritize activities and destinations that bring happiness and a sense of playfulness. They focus on living in the moment, indulging in joyful experiences, and seeking vibrant, social environments.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> • To just enjoy myself and have fun. • To indulge myself and live in the moment. • To have a fun, social setting.
EMOTIONAL TRAVEL MOTIVATION: IMPORTANCE	This travel motivation is about the desire to feel important and admired. Travellers motivated by importance often choose popular, exotic, and luxury destinations to reflect their success and gain recognition.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> • To feel like I'm important.
EMOTIONAL TRAVEL MOTIVATION: NOVEL & AUTHENTIC	This travel motivation is driven by a desire for novelty in all its forms—new places, unique experiences, and fresh perspectives. The travellers motivated by novel and authentic seek 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"> • To have authentic experiences. • To open my mind to new perspectives. • To explore and discover new things and places.
EMOTIONAL TRAVEL MOTIVATION: SECURITY	This travel motivation is around prioritizing safety and predictability. Travellers motivated by security prefer well-planned trips, reliable accommodations, and destinations known for their safety.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> • To feel welcomed. • To feel safe and secure.



GLOSSARY

DETAILS AND DEFINITIONS

EMOTIONAL TRAVEL MOTIVATION: SIMPLICITY	This travel motivation is about appreciating straightforward and easy travel experiences. Travellers motivated by simplicity prefer simpler trips with laid back itineraries and no surprises.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> • To enjoy the simplicity of easy, straightforward travel. • To feel confident of no surprises; I'll get exactly what I expected.
EMOTIONAL TRAVEL MOTIVATION: TRADITIONS	This travel motivation is about seeking to engage in traditions, whether by a traveller participating in local cultural practices or creating their own travel traditions with family and friends.	<i>Statement(s) included in the motivation:</i> <ul style="list-style-type: none"> • To create new, or take part in old, traditions.
FUNCTIONAL BENEFITS	Functional needs in travel pertain to the practical aspects necessary for a trip. These include affordable pricing, convenient transportation, comfortable accommodation, and reliable services. These needs are often about the logistics and practicalities of travel, ensuring the trip runs smoothly	
NON-TRAVELLER	Has not travelled a minimum of one night away in paid accommodation in past 5 years OR is actively planning to travel in next 2.	
PRIMARY TRIP PLANNER	The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.	
PRIORITIZE SUSTAINABLE TRAVEL	The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage.	
SEGMENT ALIGNMENT	Indicates how closely personal needs, motivations and travel behaviours on a specific trip type (e.g. long-haul trip, short-haul trip, family vacation, weekend getaway) align with the overall travel needs, motivations and behaviours that define the segment. For example, a travellers' personal needs (motivations and ideal trip specifics) may fully influence and define a long-haul trip to a bucket-list destination; however, these needs may not be a priority on a quick getaway with friends. This score provides insights into when traveller needs and behaviours shift by trip type and should be considered when targeting this segment for this type of trip	
SHORT / MID / LONG HAUL	Short Haul: Those who did not travel via flight or travelled on a less than 3 hours flight Mid Haul: Those who travelled on a 3 to 7 hours flight Long Haul: Those who travelled or 7+ hours flight	



GLOSSARY

DETAILS AND DEFINITIONS



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