UNITED KINGDOM MARKET PROFILES

The UK travel market is known for its global outlook and strong passion for international travel. British travellers seek escapes that blend adventure, bonding experiences, and relaxation, gravitating towards destinations that are both friendly and inclusive.

Their diverse preferences span from high-end luxury getaways to budget-conscious adventures, reflecting the wide range of experiences they pursue when traveling abroad.

UNITED KINGDOM

DESTINATION CANADA

A GUIDE
TO UNDERSTANDING THE PROFILE

THE STRUCTURE

Understand The Market	o Overall segment sizes in the market o Segment comparison by key metrics	01
Explore The Segments	o Detailed profiles per segment	04
Glossary	o Additional definitions for key terminology referenced in this profile	111

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**.
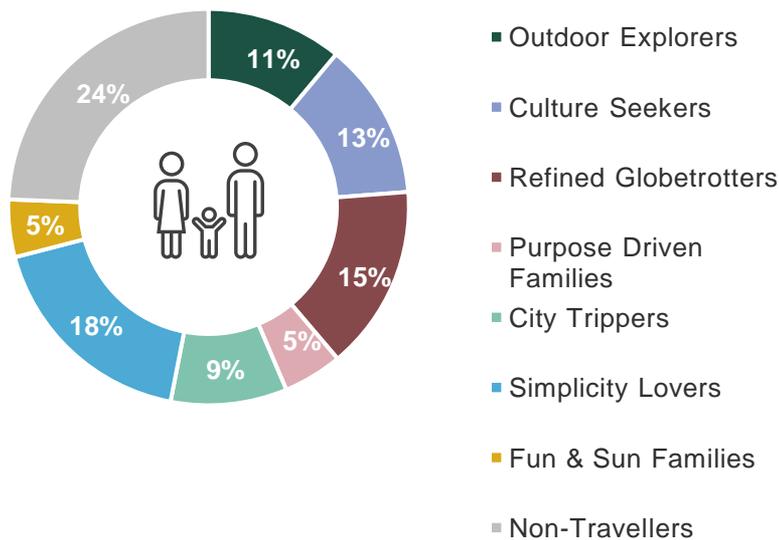
MARKET OVERVIEW

KEY MARKET HIGHLIGHTS

○ UK travellers primarily seek fun and relaxation through leisure travel, using it as a mean to truly disconnect, escape, and focus on personal well-being..

○ Most international travel is often to neighbouring countries that are easy and affordable to access, though long-haul trips can fit into annual plans.

○ Preferred destinations are friendly, social, inclusive and safe.

The UK market strongly overindexes in terms of Refined Globetrotters and Simplicity Lovers compared to other markets. British travellers often seek hidden gems and destinations that offer a blend of peaceful escapes and vibrant cultural attractions.

British tourists are less swayed by social media trends, favoring sociable, inclusive destinations that offer authentic experiences. They prioritize easy-to-navigate locations where they can immerse themselves in local culture while enjoying a break from the demands of everyday life.

MARKET SIZING

POPULATION BREAKDOWN

- 11% Outdoor Explorers
- 13% Culture Seekers
- 15% Refined Globetrotters
- 5% Purpose Driven Families
- 9% City Trippers
- 18% Simplicity Lovers
- 5% Fun & Sun Families
- 24% Non-Travellers

23.9% of the adult population in the UK (est. **53M**) are non-travellers (est. **13M**). Reasons for not travelling are often financial or health related.

OUTBOUND TRAVELLERS' BREAKDOWN

Short-haul Travellers

| 11% | 15% | 15% | 8% | 12% | 32% | 7% |

Mid-haul Travellers

| 12% | 15% | 18% | 8% | 15% | 26% | 7% |
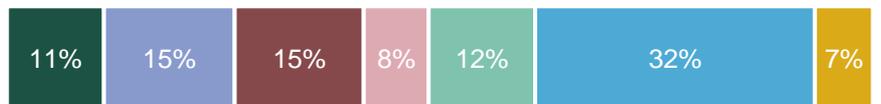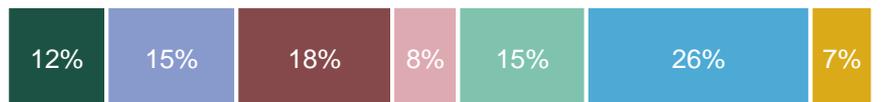
Long-haul Travellers

| 20% | 19% | 28% | 6% | 13% | 10% | 4% |

Travellers To Canada

| 20% | 18% | 28% | 6% | 8% | 17% | 3% |

⚠ **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	5.9M	Yes	o Nature Experiences o Guided Tours o Winter Sports	o Adventure o Novel & Authentic o Accomplishment
CULTURE SEEKERS	6.7M	No	o Cultural Experiences & Attractions o Festivals & Events o Cuisine	o Novel & Authentic o Connections o Familiarity
REFINED GLOBETROTTERS	8.0M	Yes	o Cultural Experiences & Attractions o Cuisine o Guided Tours	o Novel & Authentic o Bonding o Security
PURPOSE DRIVEN FAMILIES	2.5M	No	o Family-Focused Attractions o Nature Experiences o Cultural Experiences & Attractions	o Bonding o Novel & Authentic o Security
CITY TRIPPERS	4.9M	No	o Cuisine o Nightlife o Shopping	o Fun o Escape & Relax o Bonding
SIMPLICITY LOVERS	9.4M	No	o Cuisine o Nature Experiences o Shopping	o Escape & Relax o Security o Simplicity
FUN & SUN FAMILIES	2.5M	No	o Family-Focused Attractions o Shopping o Casual Sports	o Escape & Relax o Bonding o Fun

> ❗ **KEY** terminology on this page (for additional details and definitions see Glossary)
>
> o **DESTINATION CANADA PRIORITY SEGMENT** – Traveler segments prioritized by Destination Canada for targeted marketing and strategic efforts due to the opportunity they provide to contribute significantly to the Canadian tourism landscape. Aligning with these segments enables tourism partners to effectively coordinate with the national tourism strategy and maximizing their impact.
>
> o **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

11%
5.9M
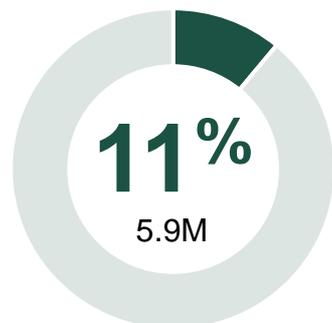
% OF UNITED KINGDOM POPULATION

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

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

WHAT YOU NEED TO KNOW ABOUT ME

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

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

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

4 We want to feel carefree in remote environments, living in the moment.

EMOTIONAL TRAVEL MOTIVATIONS MAP

Axes: Fun, Connections, Traditions, Bonding, Escape & Relax, Security, Familiarity, Simplicity, Expertise, Importance, Accomplishment, Novel & Authentic, Adventure

Scale: 0% – 50%

- - - - UK Market Average   —— Outdoor Explorer
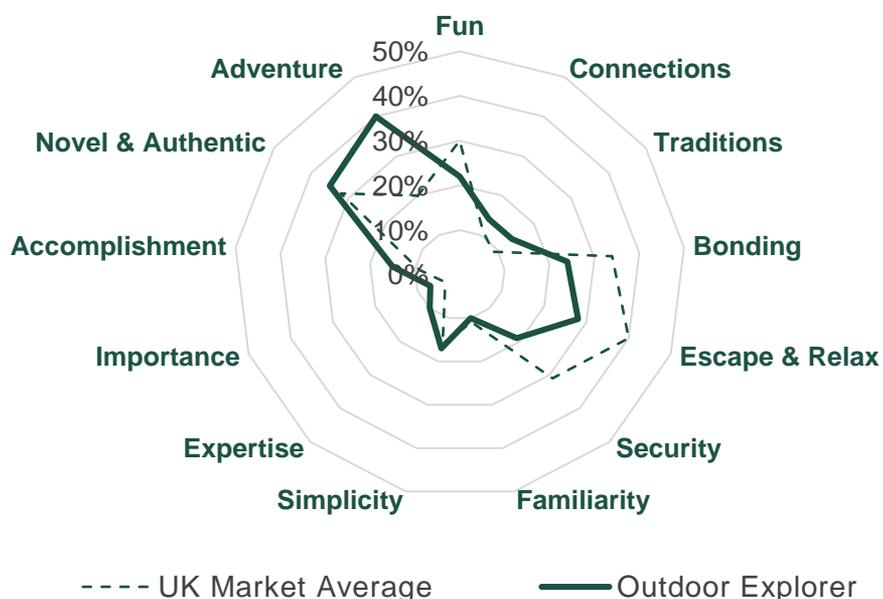
TRAVELLER RESPONSIBLE INDEX
112

How is this calculated?

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

TRAVELLER ECONOMIC INDEX
112

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

o We value outdoor experiences for how they make us feel and are always on the lookout for new destinations.

o Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment.

o We prioritize adventurous, authentic, unexplored destinations, finding highlights in natural attractions.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	80%	113
I'm always on the look out for new destinations to visit next	78%	119
I like my holiday to have some form of physical activity	77%	147
I generally think natural attractions are the highlights of my trip	76%	150
I'm passionate about travelling	76%	122
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	69%	111
I go where I want to go, no matter the hurdles	67%	139
I'm open to unconventional accommodations when travelling	53%	139
I enjoy living in the moment while travelling and don't worry much about what comes next	48%	137
I feel best on vacation when being highly active	47%	135
I like to keep my travel plans flexible and often book on short notice	39%	130
I seek out destinations where I can explore my ancestral heritage	36%	125
I'd be open to using AI-powered chatbots for travel planning and assistance	30%	129

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel a sense of adventure	51%	150
To be proud to share my travel experiences	29%	140
To push my limits and challenge myself	15%	147
To feel like I've accomplished something	15%	129
To create new, or take part in old, traditions	14%	134
To feel like a travel expert	10%	139

DESIRED DESTINATION

	SCORE	INDEX
Adventurous	56%	155
Unique	26%	122
Unexplored	25%	155
Carefree	20%	129
Free-Spirited	20%	138
Passionate	16%	127

OUTDOOR EXPLORERS
OUR DEMOGRAPHICS

OVERALL INSIGHT

o We are likely under 35 years old and have just started having children.

o We are working full time, earning a moderate income.

73%
103 Have a valid passport

GENDER

55% 120 Male

45% 82 Female

0% 83 Non-binary / Other

AGE

	SCORE	INDEX
18-34	41%	128
35-54	35%	104
55+	24%	80
MEAN YEARS	42.7	78

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	21%	100
>$40K to $120K	66%	101
More than $120K	10%	106
Refused	3%	74

HOUSEHOLD

34% 104 Children <18 Living At Home*

7% 70 Children 18+ Living At Home*

15% 80 Children NOT Living At Home*

51% 107 No Children

* Option is not exclusive

EMPLOYMENT

	SCORE	INDEX
Employed FT	56%	122
Employed PT	9%	83
Self-employed	7%	128
Retired	16%	86

EDUCATION

	SCORE	INDEX
Primary education or less	0%	120
Secondary education	19%	76
Post-secondary education	80%	123

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX		SCORE	INDEX
Greater London	20%	113	Yorkshire and The Humber	7%	77
South East	14%	105	Scotland	6%	63
South West	11%	132	East Midlands	5%	88
West Midlands	10%	112	North East	5%	112
North West	10%	82	Wales	5%	83
East of England	8%	82			

OUTDOOR EXPLORERS
OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

97

TRAVEL TRADE INDEX: **GROUP**

131

(!) KEY terminology on this page

o **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).

o **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

— Outdoor Explorer
······ Market Average

J F M A M J J A S O N D

For Flights of 7+ Hours

— Outdoor Explorer
······ Market Average

J F M A M J J A S O N D

🧳 TRIP DURATION

		INDEX
1-2 Days	31%	75
3-5 Days	25%	111
1 Week Holiday	20%	117
2 Weeks Holiday	12%	113
3 Weeks Or More	6%	110

Incidence is frequency of 2+ times per year

📍 TRIP TYPE

		INDEX
Domestic Leisure	41%	71
International Leisure	24%	96
Business Trip	13%	115
Added Personal To Business	8%	119
Worked During Vacation	9%	122

Incidence is frequency of 2+ times per year

OUTDOOR EXPLORERS
OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	43%	96
Vacation Rental (e.g., Airbnb, Vrbo)	22%	111
Premium Hotel	20%	89
Friend's or family's place	15%	96
All-inclusive resort	15%	88
Bed & Breakfast	14%	115

THOUGHTS ON INDIGENOUS TRAVEL

56%

112 INDEX SCORE

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

16%

128 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I like to explore places that are off the beaten path and less explored	79%	139
I'm willing to put in the effort while travelling in order to see lesser-known places	73%	134
I really want to learn about the history of the destinations I visit	71%	105
You only ever get to know a country by experiencing its culture	68%	79
I'm open to travelling to destinations with limited tourist infrastructure	63%	133
I'm open to visiting destinations with challenging climates or weather conditions	56%	140

OUTDOOR EXPLORERS
OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	54%	85
Adult relatives	22%	91
Kids	20%	99
Solo	19%	122
Friends	11%	99

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,850

111
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	54%	105
I consider the impact that I personally have on the destinations I visit	53%	111
It's important to me that I visit somewhere that is open to diversity and inclusion	48%	103
Hearing from underrepresented communities is an important part of travelling	45%	116
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	39%	116

48%
PRIORITIZE SUSTAINABLE TRAVEL

116 INDEX SCORE

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

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

OUTDOOR EXPLORERS
OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

○ All sports are of interest, we are not deterred by a challenging new activity.
○ Overnight experiences seek adventure as well, staying in a cabin or taking a road trip.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences	60%	146
○ Nature walks	35%	141
○ Viewing wildlife in natural habitat	33%	149
○ Explore wilderness or backcountry	23%	148
Water-based sports	25%	149
○ Swimming	15%	144
○ Kayaking, canoeing, or paddle-boarding	11%	151
High-intensity sports	13%	141
○ Mountain biking	6%	146
○ Whitewater rafting	4%	141
Winter-based sports	14%	131
○ Snowboarding or downhill skiing	7%	137
○ Snowshoeing or cross-country skiing	4%	138
Casual sports	15%	139
○ Casual biking	5%	121
○ Road cycling	5%	130
Cultural experiences or attractions	50%	85
Local cuisine	34%	70
Guided tours	29%	112
Family-focused attractions	28%	98
Festivals and events	25%	104
Overnight experiences	21%	111
Shopping	16%	56

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	52%	61	63%	85
To escape from routine	39%	85	39%	96
For adventure and excitement	37%	132	39%	117
To spend time with family	34%	85	36%	88
To learn through other cultures	23%	107	27%	100
To check off dream travel places	21%	122	34%	139
To have fun with friends	18%	93	10%	78
To have memories from top travel spots	19%	144	20%	127
For a romantic getaway	10%	72	8%	87

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	42%	81	43%	95
Family / friends wanted to go	33%	100	29%	100
Visiting friends / family	18%	86	22%	74
Special event (e.g., wedding, reunion)	20%	105	14%	87
Festival or event	22%	122	15%	93
Kids wanted to go	31%	109	19%	100

21% 99 INDEX SCORE
Travel aligns with children's school schedule

26% 103 INDEX SCORE
Take time off for vacation during major holidays

16% 121 INDEX SCORE
Difficult to take more than a few days of vacation at once

OUTDOOR EXPLORERS
OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

72%

Primary Trip Planner

127 INDEX SCORE

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

o **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

Started Researching and Planning – 6.1 Months
o Travel review sites
o Travel booking sites / apps

6 MONTHS BEFORE MY TRIP

5 MONTHS BEFORE MY TRIP

Booked Transportation – 4.7 months
o Direct with company

Booked Accommodation – 4.5 months
o Travel booking sites / apps

4 MONTHS BEFORE MY TRIP

Started Researching and Planning – 3.6 months
o Travel booking sites / apps
o Travel provider websites

3 MONTHS BEFORE MY TRIP

Booked Activities – 2.9 months
o Travel booking sites / apps

Booked Transportation – 2.9 months
o Travel booking sites / apps

2 MONTHS BEFORE MY TRIP

Booked Accommodation – 2.5 months
o Travel booking sites / apps

Booked Activities – 1.5 months
o Travel booking sites / apps

1 MONTH BEFORE MY TRIP

MY TRIP BEGINS!

DURING MY TRIP
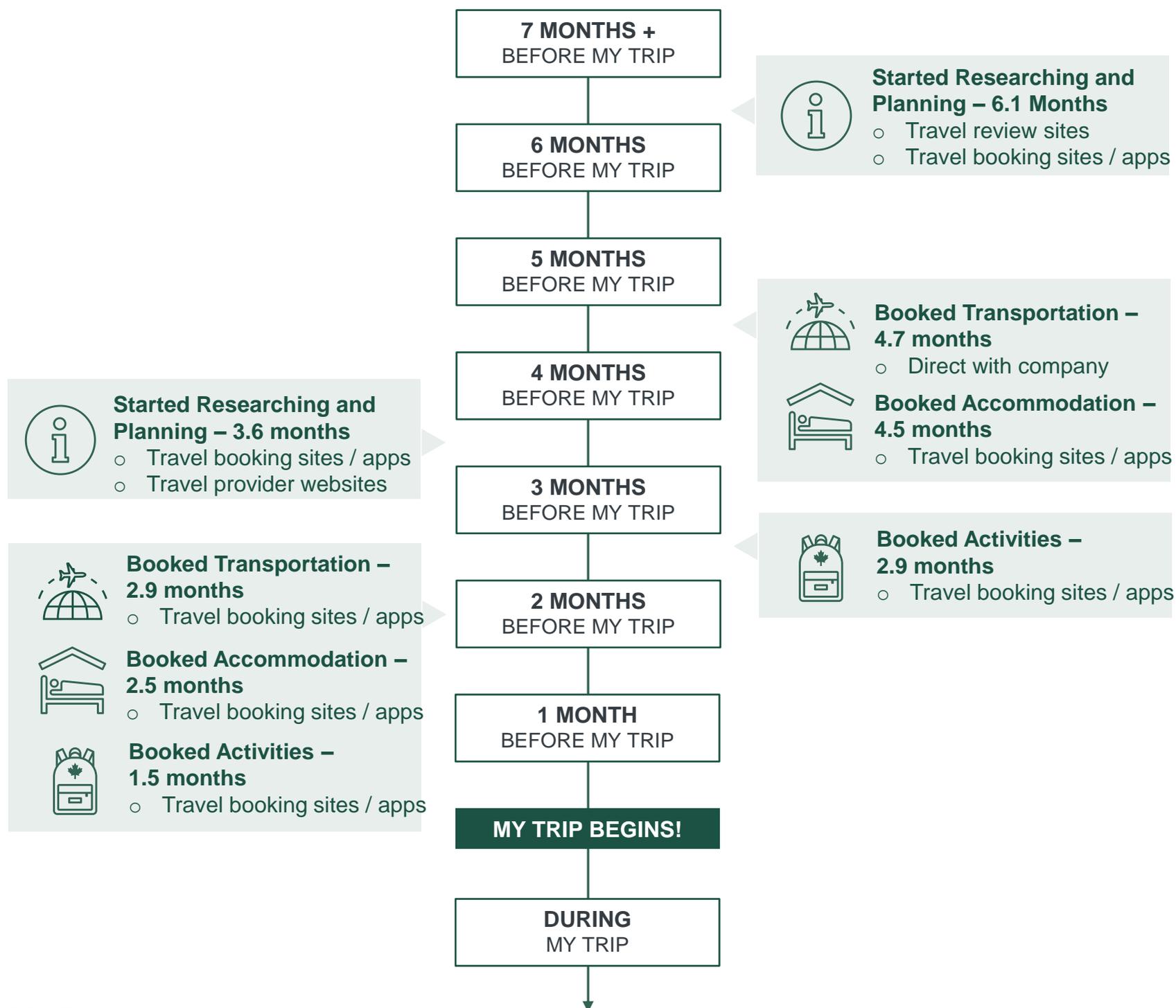
OUTDOOR EXPLORERS
OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

o Our top trips are to nature or mountain destinations.

o At times we take trips like Culture Seekers or Refined Globetrotters.

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

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

% OF TOTAL TRIPS

8% 108 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Wildlife & Nature Reserve		
COMPANIONS	Couple only		**39%**
	Extended family		**21%**
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Adventure
ACTIVITIES	Viewing wildlife in natural habitat		**57%**
	Nature walks		**53%**
	Wildlife or nature tours		**24%**
KEY BEHAVIOURS	Seeking novel and off-the-beaten path access to wildlife and landscapes		

% OF TOTAL TRIPS

6% 93 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

TRIP TYPE	Mountain Retreat		
COMPANIONS	Extended family		**28%**
	Alone		**22%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Adventure
ACTIVITIES	Mountain biking		**22%**
	See or explore mountains		**21%**
	Snowboarding or downhill skiing		**16%**
KEY BEHAVIOURS	Larger group, seeking authentic mountain town and adventure sports		

% OF TOTAL TRIPS

19% 105 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		**27%**
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Local restaurants		**39%**
	Museums		**26%**
	Historical or archeological sites		**23%**
KEY BEHAVIOURS	Seeking relaxation and cultural exploration in a unique city		

% OF TOTAL TRIPS

33% 140 INDEX SCORE

SEGMENT ALIGNMENT ● ● ○ ○ ○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		**21%**
	Small cities and town		**17%**
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants		**47%**
	Visiting local monuments		**29%**
	Outdoor markets		**19%**
KEY BEHAVIOURS	Relaxing down-time, less active, may be a beach destination or cruise		

OUTDOOR EXPLORERS
OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

o We seek access to adventure, wildlife and nature, and if it's remote and less-explored, even better!

o We frequently travel domestically, and take international trips about once a year or more.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	27%	85	Italy	3%	88
USA	8%	119	Austria	3%	149
Spain	8%	67	Canada	2%	143
France	6%	102	Germany	2%	107
Greece	5%	79	Australia	2%	136

WHERE DO WE WANT TO GO

JAPAN ALASKA NEW ZEALAND DUBAI SWEDEN ASIA
NORWAY MIAMI NORTHERN LIGHTS LAS VEGAS NEW YORK
AFRICA OAHU FRANCE NORTH AMERICA JAMAICA INDIA
  CROATIA LAKE DISTRICT CAMBODIA IBIZA SOUTH AMERICA
FLORIDA GREECE AUSTRALIA PARIS ICELAND
  BAHAMAS
SPAIN MEXICO COSTA RICA VIETNAM SCOTLAND
SOUTH AFRICA TURKEY MOUNT EVEREST ANTARCTICA LOS ANGELES
MALDIVES BORNEO ITALY PALAU BALI AMERICA CANADA
  CYPRUS AUSTRIA NEPAL

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	54%	148
Provide access to unique natural wonders	42%	146
Provides opportunities to view wildlife in its natural habitat	37%	146
Provides numerous opportunities for outdoor adventures	36%	157
Has many hidden gems	32%	126
Offers natural landscapes in close proximity to city amenities	26%	123
Provides a remote, no-frills experience	17%	150
Offers options for adrenaline seekers	10%	143

OUTDOOR EXPLORERS
OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

o We have likely been to Canada before, and more than once.

o We are most interested in British Columbia, Alberta, Nova Scotia, and the Territories.

o While Canada is on our future travel list, we also think about North America as a destination in itself.

WHERE DO WE WANT TO GO IN CANADA

BANFF PRINCE EDWARD ISLAND VANCOUVER WHISTLER ST. JOHN'S OTTAWA KELOWNA MONTREAL VICTORIA ISLAND THE ROCKIES NOVA SCOTIA QUEBEC CALGARY TORONTO PRAIRIES LAKE LOUISE ALBERTA YUKON NATIONAL PARKS HALIFAX NEW BRUNSWICK LONDON BRITISH COLUMBIA CHURCHILL NIAGARA FALLS NEWFOUNDLAND ONTARIO

PROVINCES WE HAVE VISITED BEFORE
Amongst Prior Canada Travellers
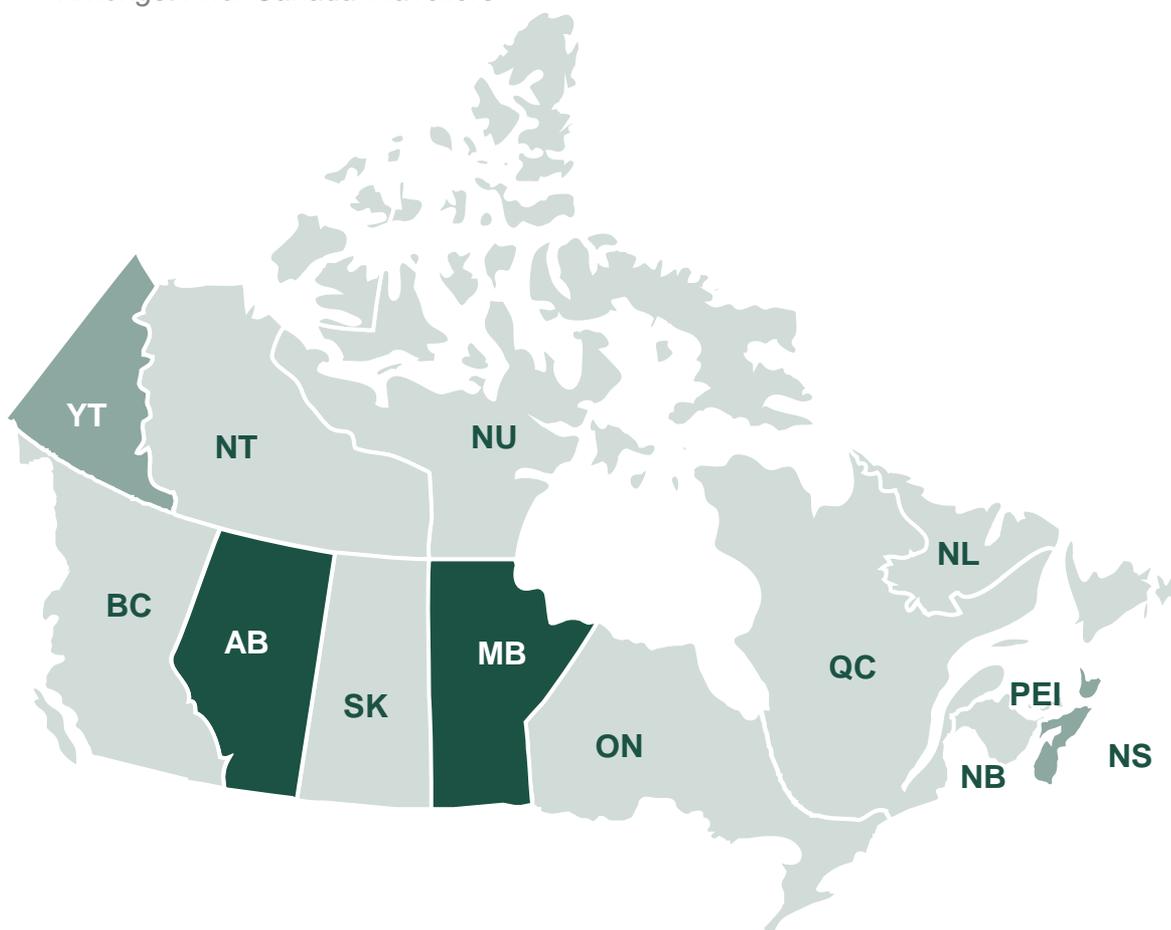
PROVINCES	%	INDEX
AB	31%	139
BC	41%	114
MB	9%	128
NB	7%	111
NL	8%	112
NS	15%	117
NT	6%	108
NU	2%	95
ON	40%	67
PEI	5%	95
QC	24%	81
SK	6%	111
YT	4%	115

DESTINATION CANADA

OUTDOOR EXPLORERS
OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

○ We are most likely to visit in the Spring and Summer.

○ Those of us who haven't visited, are definitely interested and thinking about it.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	**17%**	**30%**	**53%**	**26%**
VS. TOTAL MARKET	17%	29%	46%	29%

18% Been to Canada in last 5 years
127 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

		INDEX
▪ Definitely	11%	126
▪ Very likely	13%	133
▪ Somewhat likely	18%	119
▪ Not very likely	19%	96
▪ Not considering Canada	39%	72

FAMILIARITY WITH CANADA

		INDEX
▪ Been To Canada Multiple Times	18%	137
▪ Been To Canada Once	14%	108
▪ I know a lot about travel in Canada	4%	111
▪ I have researched it, but only superficially	13%	118
▪ I have heard it, but never looked into it	40%	73
▪ I have never heard about travel in Canada	11%	80
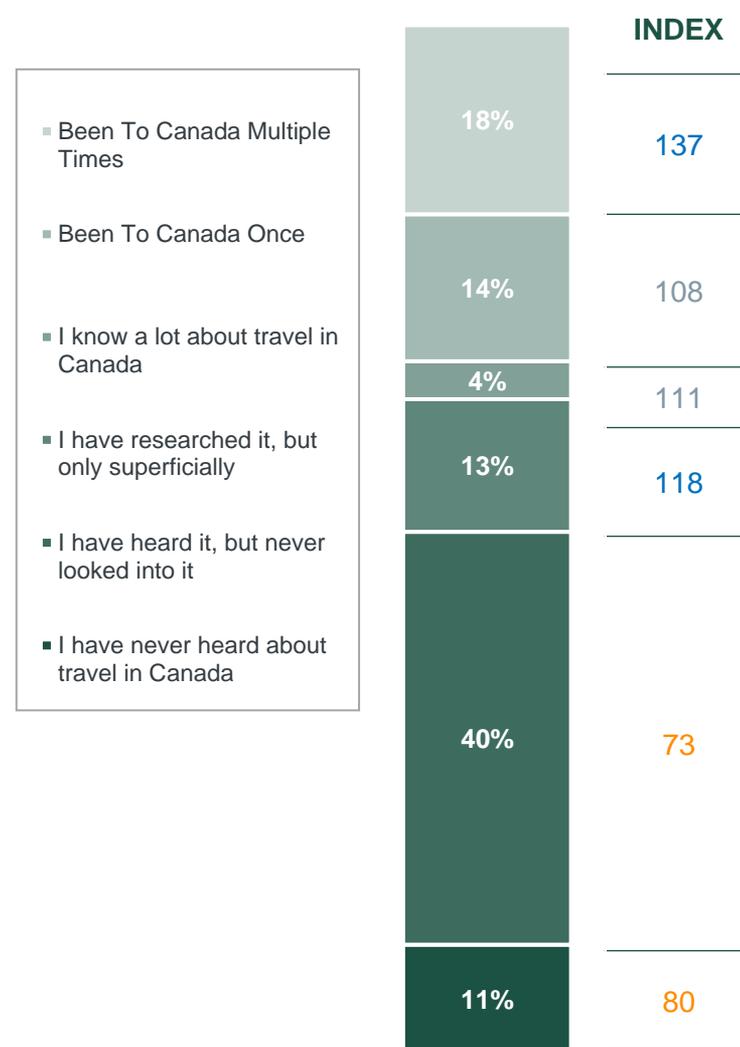
OUTDOOR EXPLORERS
OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

○ Among our youngest – we are building our lives and starting to make big moves.

○ We have recently purchased a car, started a new job, or moved to a new city.

○ Some of us are building families, having children or seeing kids off to school.

MAJOR LIFE EVENTS IN LAST 5 YEARS

9%
Had a child
102 INDEX SCORE

32%
Started a new job / career
126 INDEX SCORE

18%
Bought a new home
133 INDEX SCORE

19%
Moved to a new city
146 INDEX SCORE

9%
Child started school
102 INDEX SCORE

40%
Purchased a car
113 INDEX SCORE

8%
Retired
93 INDEX SCORE

28%
Renovated house
143 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	55%	82
Savings and investments	51%	114
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	45%	114
Experiences (e.g., concerts, events).	38%	90
Personal care and wellness	30%	88
Technology and gadgets	23%	124

OUTDOOR EXPLORERS
FIND US ONLINE – MEDIA PROFILING

TOP PUBLICATIONS

	SCORE	INDEX
BBC News	52%	100
The Guardian	28%	112
Daily Mail	17%	93
Sky News	14%	69
The Times	12%	96
ITV News	11%	84
Metro	11%	108
The Telegraph	10%	93
Channel 4 News	9%	87
Financial Times	8%	94
Evening Standard	8%	143
The Independent	8%	90
The Mirror	5%	82
National Geographic	5%	112
The Economist	5%	73
Time Out	3%	105
The Spectator	3%	103
Wanderlust	3%	156
Conde Nast Traveller	2%	131
The New Statesman	2%	78

TOP SOCIAL PLATFORMS

	SCORE	INDEX
YouTube	66%	106
Facebook	65%	96
Instagram	56%	105
Twitter (now X)	28%	89
TikTok	21%	91
Threads	6%	70

TOP TRAVEL PLATFORMS

|	SCORE	INDEX
TripAdvisor	28%	107
Expedia	10%	84
Lonely Planet	7%	141
The Points Guy UK	4%	115
Rough Guide	3%	134
Hand Luggage Only	2%	134
Adventure.com	1%	69

SOURCE: GTRP 2024

This media profiling comes from usage of the long-form Segmentation Typing Tool in Destination Canada's 2024/2025 Global Traveller Research Program custom survey.

Date: December 2024

CULTURE SEEKERS

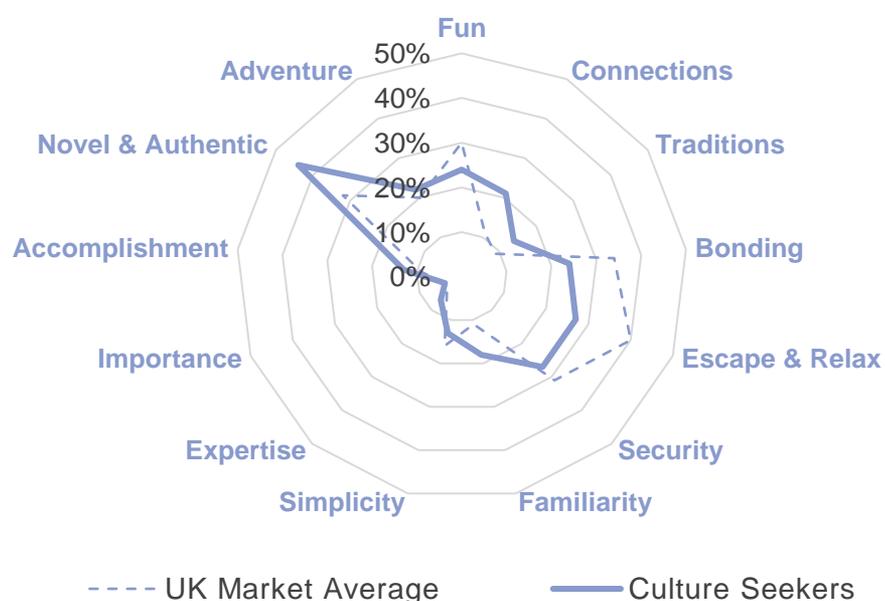## PSYCHOGRAPHICS – SUMMARY

13%
6.7M
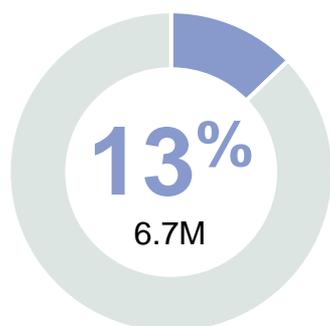
% OF UNITED KINGDOM POPULATION

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

WHAT YOU NEED TO KNOW ABOUT ME

1 We prioritize diversity, inclusion, sustainability and supporting the local economy.

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

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

4 Travelling to less explored places and engaging with new cultures provides a sense of accomplishment that we value.

EMOTIONAL TRAVEL MOTIVATIONS MAP

Radar chart with axes: Fun, Connections, Traditions, Bonding, Escape & Relax, Security, Familiarity, Simplicity, Expertise, Importance, Accomplishment, Novel & Authentic, Adventure. Scale 0% to 50%.

- - - - UK Market Average   —— Culture Seekers

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

105

How is this calculated?

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

CULTURE SEEKERS
OUR PSYCHOGRAPHICS — TRAVEL VALUES

OVERALL INSIGHT

o We seek authentic experiences, embracing new perspectives and connecting with locals.

o We are dedicated to sustainable travel, ensuring we respect and preserve the environment.

o Staying flexible and being open to spontaneous experiences is how we get the most out of travel.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Trying out local cuisine is a really important part of travel	78%	124
I like to come back from travels having learnt something new	78%	119
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	74%	125
I like to be able to take my time at a historic site or in a museum and not feel rushed	73%	109
When I travel to natural environments it makes me reflect on how fortunate I am	72%	126
I learn the basics of a language before visiting a country / region	66%	131
I'm passionate about travelling	66%	107
I am more likely to select destinations / activities that invest in socially responsible tourism	64%	130
I go where I want to go, no matter the hurdles	51%	115
I'm open to unconventional accommodations when travelling	43%	121
I seek out destinations where I can explore my ancestral heritage	34%	121
Even while travelling, I like to maintain regular contact with my duties or obligations back home	34%	127
I'd be open to using AI-powered chatbots for travel planning and assistance	26%	119

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	40%	127
To open my mind to new perspectives	39%	136
To feel connected with new people	22%	137
To feel like a local	21%	142
To be familiar with my surroundings	16%	116
To feel like I've accomplished something	15%	126

DESIRED DESTINATION

	SCORE	INDEX
Authentic	51%	141
Accepting	32%	146
Unique	28%	127
Sociable	27%	115
Open	27%	150
Free-Spirited	16%	119

CULTURE SEEKERS
OUR DEMOGRAPHICS

OVERALL INSIGHT

o We represent a diverse age range and most of us don't have children.

o We are generally employed full-time.

o We are most likely to be found in greater London.

80%
118 Have a valid passport

GENDER

53% 114 Male

45% 83 Female

2% 147 Non-binary / Other

AGE

	SCORE	INDEX
18-34	34%	113
35-54	30%	94
55+	36%	95
MEAN YEARS	46.2	90

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	21%	99
>$40K to $120K	67%	108
More than $120K	9%	101
Refused	3%	79

HOUSEHOLD

21% 94 Children <18 Living At Home*

7% 71 Children 18+ Living At Home*

22% 93 Children NOT Living At Home*

57% 113 No Children

EMPLOYMENT

	SCORE	INDEX
Employed FT	51%	112
Employed PT	13%	100
Self-employed	6%	119
Retired	18%	90

EDUCATION

	SCORE	INDEX
Primary education or less	0%	80
Secondary education	21%	81
Post-secondary education	79%	120

* Option is not exclusive

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX			SCORE	INDEX
Greater London	22%	120		Scotland	7%	83
South East	13%	96		South West	6%	78
West Midlands	11%	119		East Midlands	6%	95
North West	10%	87		Wales	5%	107
East of England	10%	99		North East	4%	86
Yorkshire and The Humber	7%	80				

CULTURE SEEKERS
OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

85

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

—— Culture Seekers
········· Market Average

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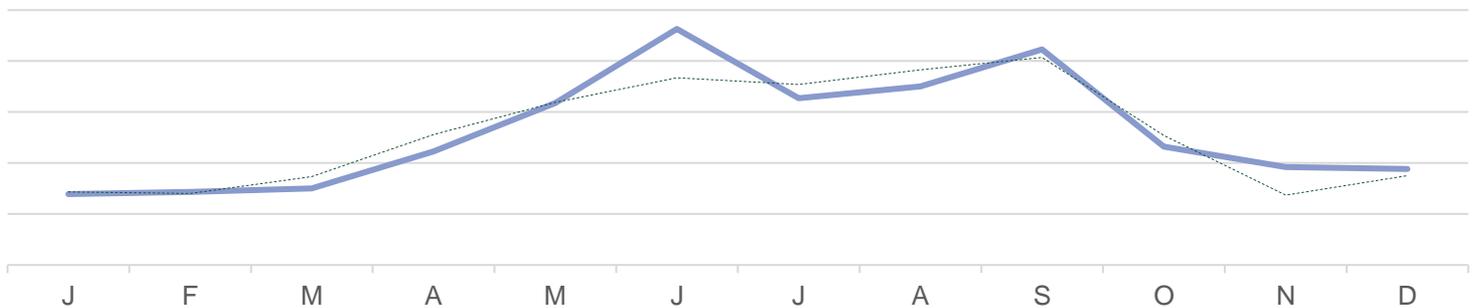
For Flights of 7+ Hours

—— Culture Seekers
········· Market Average

J F M A M J J A S O N D
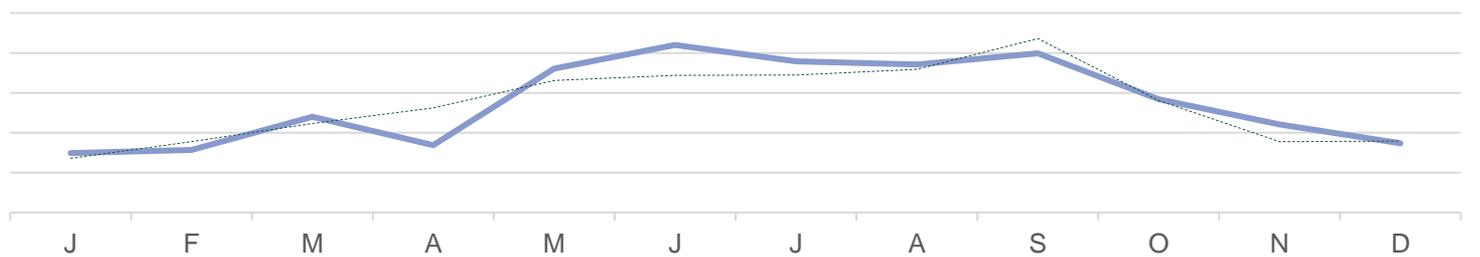
TRIP DURATION

		INDEX
1-2 Days	**41%**	127
3-5 Days	**26%**	113
1 Week Holiday	**18%**	101
2 Weeks Holiday	**15%**	126
3 Weeks Or More	**9%**	135

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	**44%**	103
International Leisure	**30%**	112
Business Trip	**15%**	123
Added Personal To Business	**6%**	108
Worked During Vacation	**10%**	127

Incidence is frequency of 2+ times per year

CULTURE SEEKERS
OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	45%	107
Vacation Rental (e.g., Airbnb, Vrbo)	21%	104
Premium Hotel	21%	92
Friend's or family's place	19%	135
Budget Hotel	17%	131
Bed & Breakfast	15%	119

THOUGHTS ON INDIGENOUS TRAVEL

66%

131 INDEX SCORE

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

16%

130 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	79%	131
I really want to learn about the history of the destinations I visit	79%	121
I like to explore places that are off the beaten path and less explored	69%	125
I'm willing to put in the effort while travelling in order to see lesser-known places	66%	123
I'm open to travelling to destinations with limited tourist infrastructure	61%	130
I'm open to visiting destinations with challenging climates or weather conditions	44%	121

CULTURE SEEKERS
OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

o We travel primarily as a couple, and sometimes alone.
o Our budgets are usually mid range, but can splurge on solo trips.

✈ TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	49%	75
Solo	23%	137
Adult relatives	21%	79
Kids	12%	92
Friends	12%	101

💰 BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,260

94
INDEX SCORE

SPEND STYLE
Mid-range to Premium

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	70%	138
It's important for me to know that the money I spend will support the local economy I'm visiting	65%	138
I consider the impact that I personally have on the destinations I visit	64%	131
Hearing from underrepresented communities is an important part of travelling	57%	135
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	45%	126

54%

PRIORITIZE SUSTAINABLE TRAVEL

126 INDEX SCORE

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

o **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

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	71%	134
o Museums	45%	134
o Historical or archeological sites	42%	120
o Visiting local monuments	41%	134
Local cuisine	55%	109
o Local restaurants	47%	108
o Cafes or bakeries	31%	115
Festivals and events	41%	141
o Music concerts or festivals	26%	133
o Cultural or traditional festivals	15%	141
Casual sports	13%	119
o Casual biking	5%	118
o Road cycling	5%	126
High-intensity sports	7%	110
o Mountain biking	3%	111
o Bungee jumping or skydiving	2%	112
Nature experiences	34%	88
Shopping	30%	86
Guided tours	24%	99
Overnight experiences	21%	110
Health and wellness	17%	93
Nightlife	16%	104
Family-focused attractions	16%	85

CULTURE SEEKERS
OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF **3–7 HOURS**		TRIPS OF FLIGHTS OF **7+ HOURS**	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	57%	72	60%	77
To escape from routine	32%	71	32%	81
To spend time with family	35%	87	33%	84
To learn through other cultures	35%	140	42%	127
For adventure and excitement	35%	127	38%	115
To have fun with friends	30%	123	26%	120
To check off dream travel places	23%	131	21%	89
For a romantic getaway	13%	99	11%	102
For personal reflection and growth	13%	121	12%	130

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	46%	89	37%	84
Visiting friends / family	33%	142	38%	129
Family / friends wanted to go	30%	89	26%	92
Festival or event	26%	134	25%	129
Special event (e.g., wedding, reunion)	24%	116	33%	129
Kids wanted to go	18%	95	10%	91

14% 92 INDEX SCORE

Travel aligns with children's school schedule

21% 95 INDEX SCORE

Take time off for vacation during major holidays

16% 124 INDEX SCORE

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

DESTINATION CANADA

CULTURE SEEKERS
OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

o We generally plan within 4-5 months of a trip and use many information resources.

73%
Primary Trip Planner
130
INDEX SCORE

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

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

FLIGHT OF
3–7 HOURS

FLIGHT OF
7+ HOURS

7 MONTHS +
BEFORE MY TRIP

6 MONTHS
BEFORE MY TRIP

Started Researching and Planning – 5.1 Months
o Travel provider websites
o Travel booking sites / apps

5 MONTHS
BEFORE MY TRIP

4 MONTHS
BEFORE MY TRIP

Booked Transportation – 4.0 months
o Direct with company

Started Researching and Planning – 3.7 months
o Travel review sites
o Travel booking sites / apps

Booked Accommodation – 3.7 months
o Travel booking sites / apps

3 MONTHS
BEFORE MY TRIP

Booked Activities – 2.3 months
o Travel booking sites / apps

Booked Transportation – 2.9 months
o Direct with company

2 MONTHS
BEFORE MY TRIP

Booked Accommodation – 2.9 months
o Travel booking sites / apps

Booked Activities – 1.5 months
o Travel booking sites / apps

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP
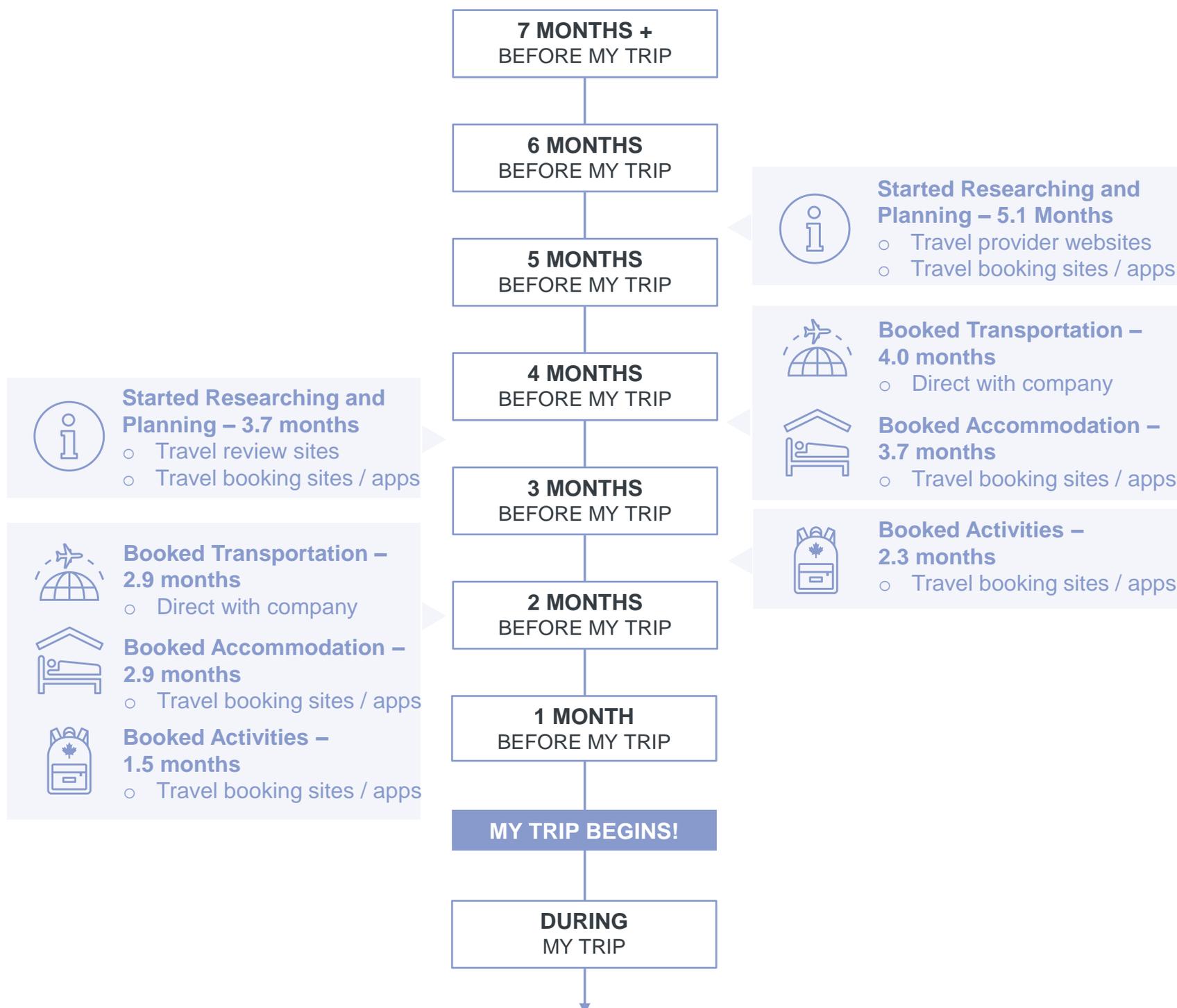
CULTURE SEEKERS
OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

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

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

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

% OF TOTAL TRIPS
23% 113 INDEX SCORE

SEGMENT ALIGNMENT
● ● ● ● ●

TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		27%
	Cultural experience		16%
TRIP EMOTIONAL MOTIVATIONS	Fun	Novel & Authentic	Escape & Relax
ACTIVITIES	Local restaurants		39%
	Museums		26%
	Historical or archeological sites		23%
KEY BEHAVIOURS	Exploration of safe and trendy destinations, not planned too far in advance		

% OF TOTAL TRIPS
20% 158 INDEX SCORE

SEGMENT ALIGNMENT
● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Alone		34%
	Couple only		30%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Novel & Authentic
ACTIVITIES	Museums		39%
	Bars and pubs		30%
	Visiting local monuments		28%
KEY BEHAVIOURS	Visiting friends, connecting, trying local restaurants and nightlife		

% OF TOTAL TRIPS
12% 122 INDEX SCORE

SEGMENT ALIGNMENT
● ● ● ● ●

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		38%
	Alone		33%
TRIP EMOTIONAL MOTIVATIONS	Novel & Authentic	Fun	Security
ACTIVITIES	Local restaurants		64%
	Visiting local monuments		46%
	Museums		45%
KEY BEHAVIOURS	Authentic experience, immersed in a new culture. Planned well in advance		

% OF TOTAL TRIPS
36% 140 INDEX SCORE

SEGMENT ALIGNMENT
● ● ○ ○ ○

TRIP TYPE	Couples Trip		
DESTINATION TYPE	Beach resort		32%
	Countryside and village		24%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Security
ACTIVITIES	Local restaurants		38%
	Outdoor markets		21%
	Nature walks		19%
KEY BEHAVIOURS	Planned in advance, affordable destination, focussed on reliability and ease of travel		

CULTURE SEEKERS
OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

o We seek rich culture and heritage, with a variety of museums and historical sites.

o We travel in the UK and Europe, including Spain, France and Italy. We have also visited the USA.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	**28%**	87	Greece	**5%**	82
Spain	**10%**	78	Germany	**3%**	138
France	**8%**	131	Portugal	**3%**	85
USA	**8%**	113	Japan	**2%**	123
Italy	**6%**	119	Thailand	**2%**	121

WHERE DO WE WANT TO GO

BEACH NEW ZEALAND BRAZIL ALASKA AUSTRALIA
AMERICA GERMANY AMALFI COAST NORWAY CHINA POMPEII ORLANDO SPAIN PARIS
PERU CHICAGO SCOTLAND MOROCCO AUSTRIA
POLAND CANADA HAWAII ITALY
DUBLIN DUBAI COSTA RICA INDIA CRUISE MALDIVES SCANDAVIAN FJORDS
EUROPE CROATIA NEW YORK JAPAN ANTARCTICA
SOUTH AMERICA NEPAL PORTUGAL PHUKET, THAILAND PRAGUE TURKEY ICELAND
GREECE NORTHERN LIGHTS UNITED STATES
BARCELONA AMSTERDAM SCOTTISH HIGHLANDS

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	**47%**	134
Has a variety of museums and / or historical sites	**40%**	129
Is inclusive and tolerant	**39%**	150
Has many hidden gems	**32%**	127
Provides a variety of local festivals and events	**27%**	149
Has a thriving arts and music scene	**20%**	151
Offers an energetic and dynamic cultural scene	**19%**	145
Offers an eccentric and unique atmosphere	**15%**	135

CULTURE SEEKERS
OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

o We have likely visited Canada once or twice, but perhaps not in the past five years.

o We have explored a range of provinces, favouring Ontario, British Columbia and Quebec, but also ventured into the Prairies, Atlantic provinces, and the Territories.

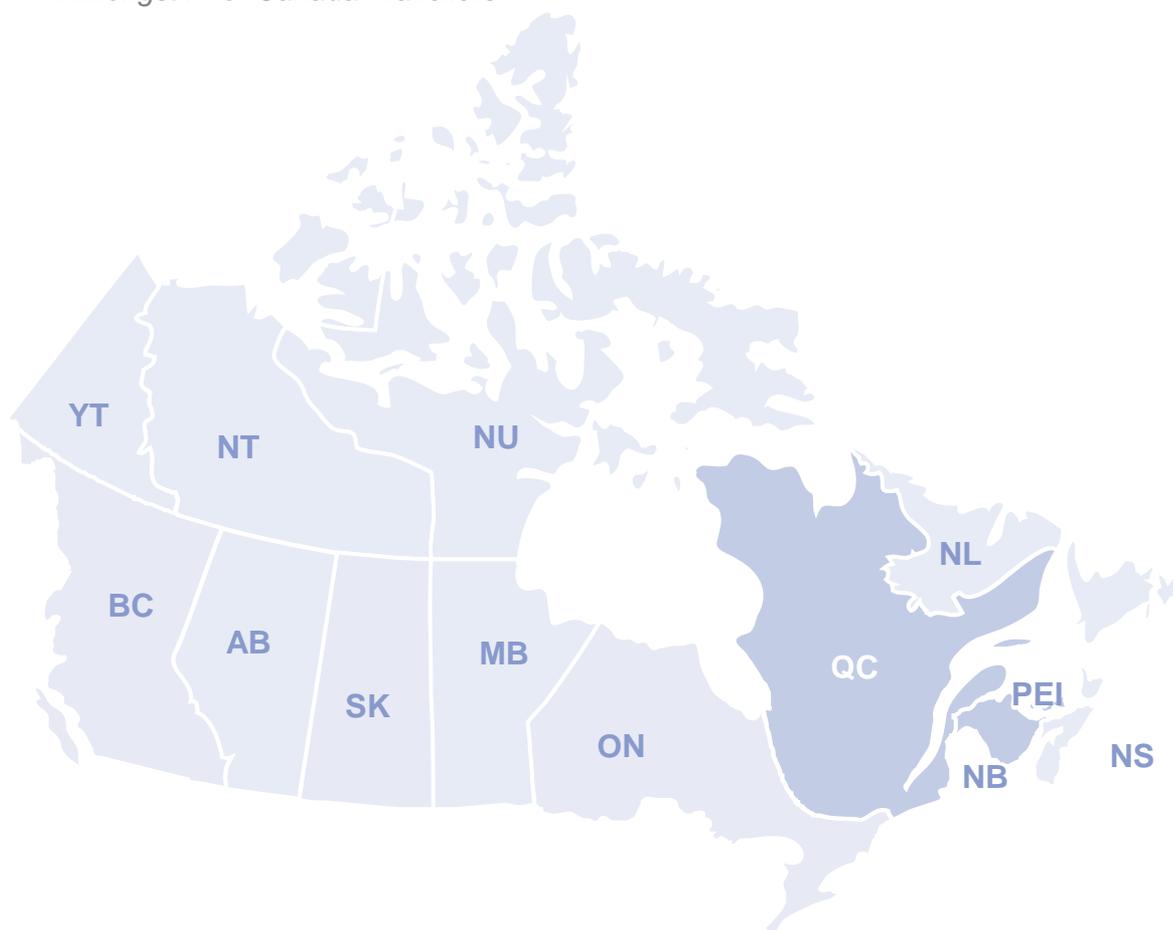o A future visit could include Toronto or Vancouver.

WHERE DO WE WANT TO GO IN CANADA

NEWFOUNDLAND AND LABRADOR VANCOUVER
NOVA SCOTIA BRAMPTON MANITOBA WATERFALLS
BRITISH COLUMBIA PRINCE EDWARD ISLAND
OTTAWA TORONTO VICTORIA BANFF
SASKATCHEWAN
CALGARY NIAGARA FALLS CANADIAN ROCKIES
ONTARIO MONTREAL EDMONTON QUEBEC
GREAT LAKES

PROVINCES WE HAVE VISITED BEFORE
Amongst Prior Canada Travellers

PROVINCES	%	INDEX
AB	16%	72
BC	31%	80
MB	4%	94
NB	8%	116
NL	4%	82
NS	8%	92
NT	6%	109
NU	4%	110
ON	46%	94
PEI	5%	91
QC	28%	117
SK	2%	86
YT	4%	108

CULTURE SEEKERS
OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

o Most travel to Canada has been done during the spring, summer and fall months.

o A number of us are likely to return to Canada within the next couple of years, especially those who have visited before.

o 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	**24%**	**30%**	**43%**	**26%**
VS. TOTAL MARKET	17%	29%	46%	29%

14% Been to Canada in last 5 years
114 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS
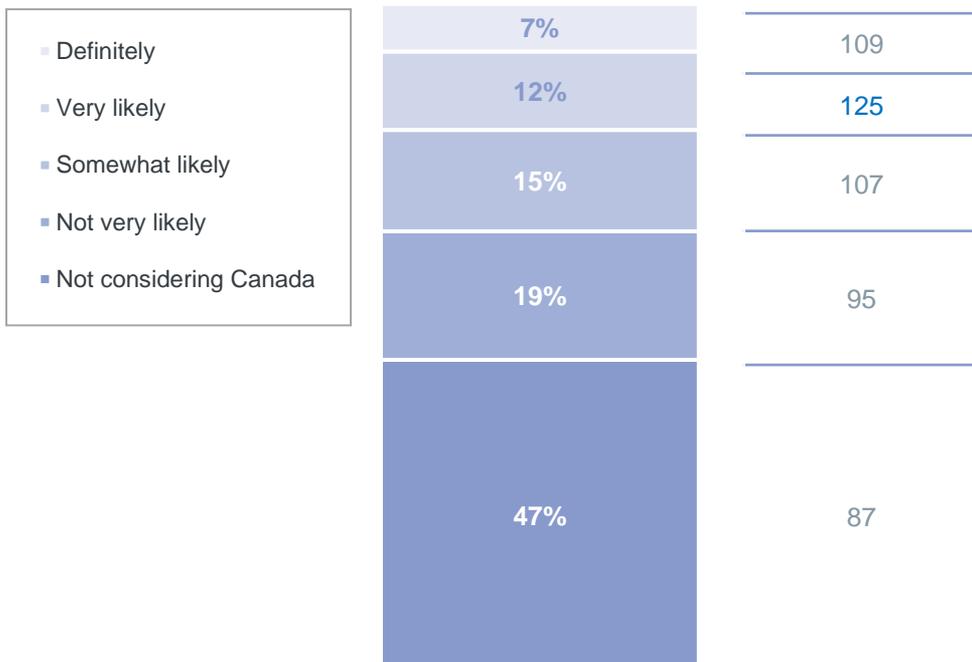
		INDEX
Definitely	7%	109
Very likely	12%	125
Somewhat likely	15%	107
Not very likely	19%	95
Not considering Canada	47%	87

FAMILIARITY WITH CANADA

		INDEX
Been To Canada Multiple Times	12%	106
Been To Canada Once	13%	101
I know a lot about travel in Canada	2%	94
I have researched it, but only superficially	12%	109
I have heard it, but never looked into it	48%	112
I have never heard about travel in Canada	13%	87
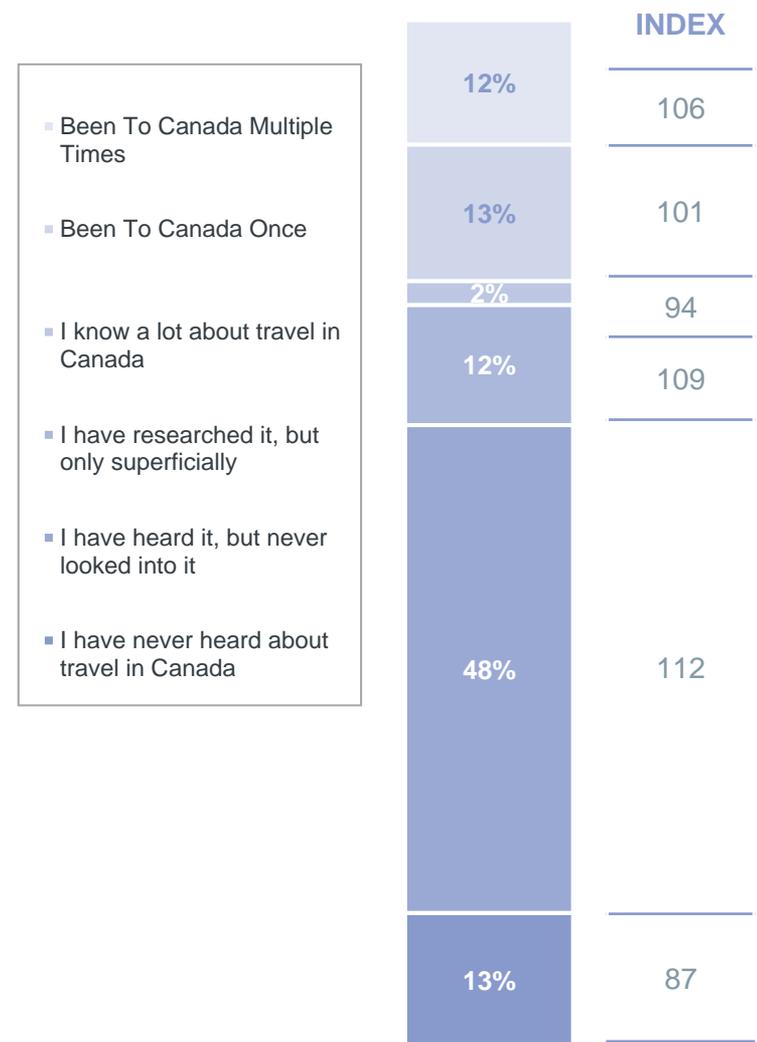
CULTURE SEEKERS
OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

o We primarily spend our money on leisure travel and experiences.

o In the last 5 years, we have started a new job, purchased a new car, and some of us have also invested in home renovations or bought a new home.

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%
Had a child
95 INDEX SCORE

31%
Started a new job / career
122 INDEX SCORE

12%
Bought a new home
103 INDEX SCORE

12%
Moved to a new city
113 INDEX SCORE

4%
Child started school
93 INDEX SCORE

30%
Purchased a car
78 INDEX SCORE

8%
Retired
94 INDEX SCORE

19%
Renovated house
74 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	57%	86
Experiences (e.g., concerts, events).	47%	121
Savings and investments	45%	93
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	44%	113
Personal care and wellness	31%	97
Technology and gadgets	22%	118

CULTURE SEEKERS
FIND US ONLINE – MEDIA PROFILING

TOP PUBLICATIONS

	SCORE	INDEX
BBC News	54%	104
The Guardian	38%	150
Sky News	21%	101
The Times	14%	112
The Independent	13%	157
Metro	13%	134
The Telegraph	13%	118
ITV News	13%	93
Daily Mail	11%	61
Channel 4 News	11%	112
The Economist	11%	172
Financial Times	9%	106
The Mirror	8%	126
Evening Standard	8%	141
National Geographic	6%	148
Time Out	4%	135
The New Statesman	4%	203
The Spectator	3%	120
Conde Nast Traveller	3%	176
Wanderlust	3%	144

TOP SOCIAL PLATFORMS

	SCORE	INDEX
Facebook	66%	97
YouTube	64%	104
Instagram	56%	106
Twitter (now X)	33%	106
TikTok	23%	98
Threads	13%	143

TOP TRAVEL PLATFORMS

|	SCORE	INDEX
TripAdvisor	27%	104
Expedia	15%	129
Lonely Planet	8%	158
The Points Guy UK	5%	169
Rough Guide	4%	173
Hand Luggage Only	3%	185
Adventure.com	2%	122

SOURCE: GTRP 2024

This media profiling comes from usage of the long-form Segmentation Typing Tool in Destination Canada's 2024/2025 Global Traveller Research Program custom survey.

Date: December 2024

REFINED GLOBETROTTERS
PSYCHOGRAPHICS — SUMMARY
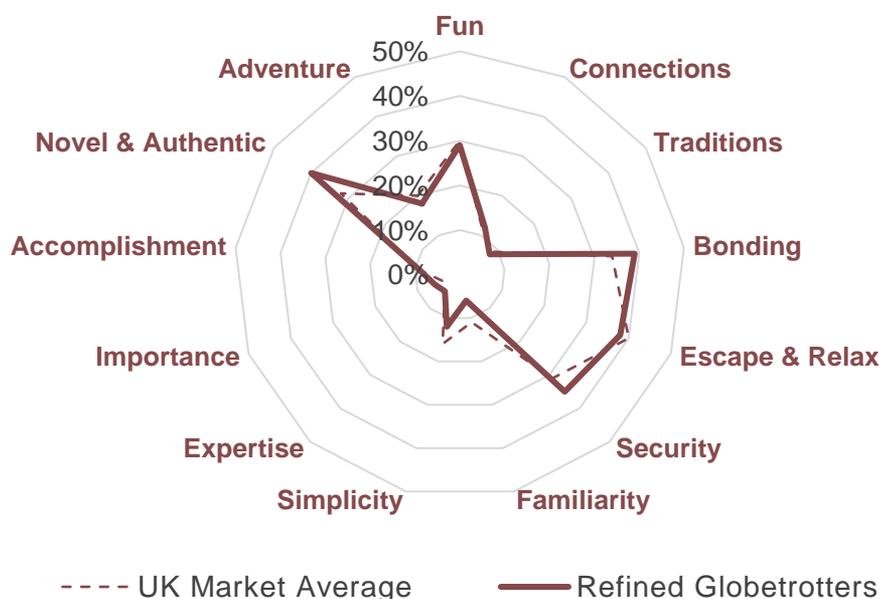
15%
8.0M
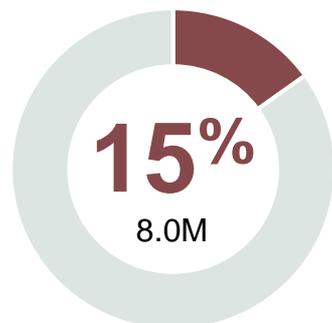
% OF UNITED KINGDOM POPULATION

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

We immerse ourselves in history, museums, and the authentic charm of new places, ensuring smooth travel with all-inclusive packages and expert-guided tours.

WHAT YOU NEED TO KNOW ABOUT ME

1 Travel is our #1 spending priority.

2 We have the flexibility to travel at any time of year, as our kids are grown up.

3 We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.

4 We may be lapsed visitors to Canada, so need to learn about the culture, experiences, and luxury we haven't seen yet.

EMOTIONAL TRAVEL MOTIVATIONS MAP

Radar chart axes: Fun, Connections, Traditions, Bonding, Escape & Relax, Security, Familiarity, Simplicity, Expertise, Importance, Accomplishment, Novel & Authentic, Adventure. Scale from 0% to 50%.

- - - - UK Market Average —— Refined Globetrotters

TRAVELLER RESPONSIBLE INDEX
103

How is this calculated?

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

TRAVELLER ECONOMIC INDEX
136

How is this calculated?

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

REFINED GLOBETROTTERS
OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I'm always on the look out for new destinations to visit next	83%	128
I like to come back from travels having learnt something new	79%	122
I'm passionate about travelling	78%	126
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	75%	126
I tend to not think about my budget too much when travelling	67%	146
While I think about value for money, it doesn't tend to influence my choice of destination	66%	134
Luxury experiences are an important part of travel	64%	149
I generally don't participate in physical activities during my holidays	59%	113
I make sure to visit the "famous" sites wherever I go	58%	129
I enjoy joining guided tours to explore new destinations	41%	130
When traveling, I expect 24 / 7 support from a travel provider	37%	134
I seek travel advice from travel agencies and agents	36%	137
I seek out fine dining experiences and gourmet cuisine when I travel	34%	127

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	57%	134
To feel safe and secure	42%	109
To have authentic experiences	38%	122
To bond through shared experiences	30%	123
To open my mind to new perspectives	26%	110
To be proud to share my travel experiences	20%	106

DESIRED DESTINATION

	SCORE	INDEX
Authentic	40%	116
Luxurious	37%	152
Charming	27%	117
Exclusive	25%	151
Unique	20%	107
World-Class	17%	142

REFINED GLOBETROTTERS
OUR DEMOGRAPHICS

OVERALL INSIGHT

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

87%
134 Have a valid passport

GENDER

51% 107 Male

49% 92 Female

1% 113 Non-binary / Other

AGE

	SCORE	INDEX
18-34	**22%**	90
35-54	**30%**	93
55+	**49%**	111
MEAN YEARS	**52.0**	111

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	**10%**	53
>$40K to $120K	**70%**	131
More than $120K	**16%**	147
Refused	**4%**	107

HOUSEHOLD

22% 95 Children <18 Living At Home*

14% 125 Children 18+ Living At Home*

34% 113 Children NOT Living At Home*

44% 99 No Children

EMPLOYMENT

	SCORE	INDEX
Employed FT	**50%**	109
Employed PT	**11%**	91
Self-employed	**4%**	99
Retired	**27%**	104

EDUCATION

	SCORE	INDEX
Primary education or less	**1%**	140
Secondary education	**23%**	87
Post-secondary education	**77%**	112

* Option is not exclusive

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX			SCORE	INDEX
Greater London	**17%**	102		West Midlands	**8%**	58
South East	**15%**	124		East of England	**7%**	69
North West	**11%**	99		East Midlands	**7%**	101
Scotland	**10%**	139		Wales	**5%**	93
South West	**9%**	109		North East	**5%**	102
Yorkshire and The Humber	**8%**	91				

REFINED GLOBETROTTERS
OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: NON-GROUP

140

TRAVEL TRADE INDEX: GROUP

114

(!) KEY terminology on this page

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

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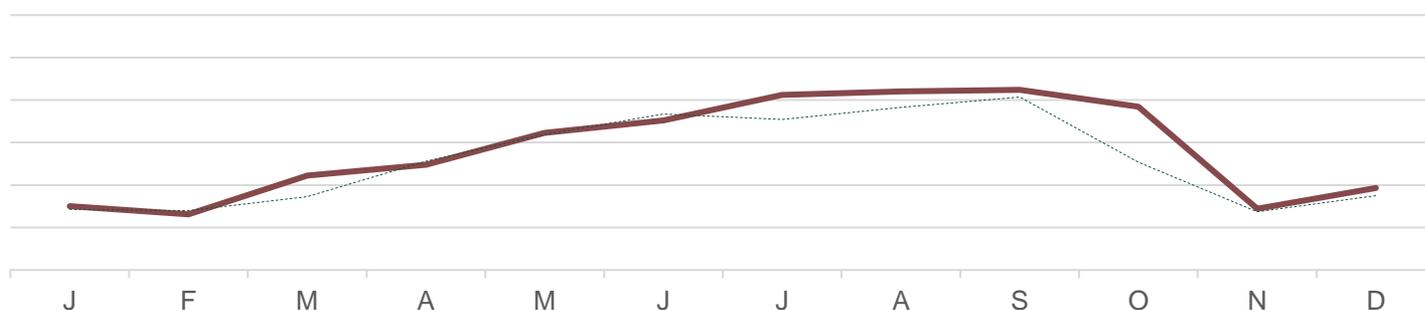
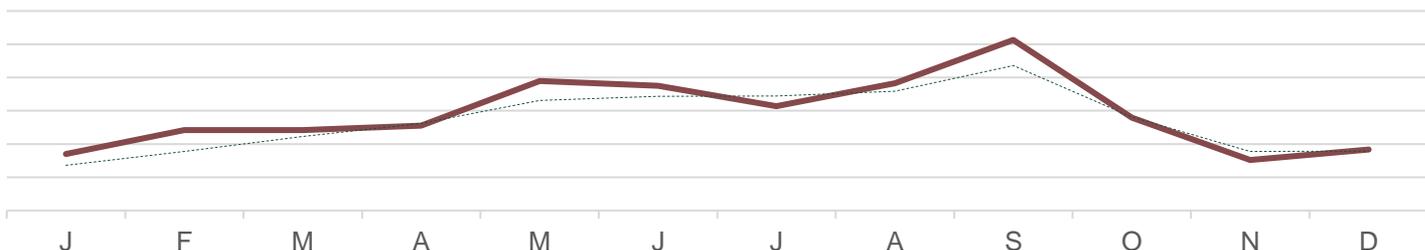For additional definitions see Glossary

🗓 TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours

— Refined Globetrotters
······ Market Average

J F M A M J J A S O N D

For Flights of 7+ Hours

— Refined Globetrotters
······ Market Average

J F M A M J J A S O N D

🧳 TRIP DURATION

		INDEX
1-2 Days	40%	120
3-5 Days	27%	120
1 Week Holiday	22%	124
2 Weeks Holiday	14%	121
3 Weeks Or More	6%	109

Incidence is frequency of 2+ times per year

📍 TRIP TYPE

		INDEX
Domestic Leisure	43%	99
International Leisure	39%	134
Business Trip	14%	117
Added Personal To Business	5%	106
Worked During Vacation	6%	104

Incidence is frequency of 2+ times per year

REFINED GLOBETROTTERS
OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Premium Hotel	40%	147
Mid-priced Hotel	34%	62
All-inclusive resort	25%	134
Cruise ship	16%	150
Vacation Rental (e.g., Airbnb, Vrbo)	15%	51
High-end / Luxury Hotel	12%	148

THOUGHTS ON INDIGENOUS TRAVEL

57%

114 INDEX SCORE

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

11%

105 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	79%	120
You only ever get to know a country by experiencing its culture	76%	116
I'm willing to put in the effort while travelling in order to see lesser-known places	57%	109
I like to explore places that are off the beaten path and less explored	48%	94
I'm open to travelling to destinations with limited tourist infrastructure	38%	88
I'm open to visiting destinations with challenging climates or weather conditions	31%	99

OVERALL INSIGHT

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

✈ TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	67%	111
Adult relatives	24%	105
Kids	15%	95
Friends	11%	98
Solo	8%	84

💰 BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,490

129 INDEX SCORE

SPEND STYLE
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	51%	95
I consider the impact that I personally have on the destinations I visit	45%	98
It's important to me that I visit somewhere that is open to diversity and inclusion	45%	98
Hearing from underrepresented communities is an important part of travelling	37%	103
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	27%	92

35%
PRIORITIZE SUSTAINABLE TRAVEL
95 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

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Cultural experiences or attractions	67%	125
o Historical or archeological sites	44%	127
o Museums	42%	124
o Visiting local monuments	40%	129
Local cuisine	64%	127
o Local restaurants	55%	125
o Luxury dining	26%	146
Guided tours	37%	138
o City tours	29%	137
o Boat tours	18%	150
Overnight experiences	27%	135
o Cruise	16%	148
o Staying at all-inclusive resort	10%	133
Health and wellness	22%	140
o Spas	16%	131
o Sauna or steam bath	13%	143
Shopping	41%	109
Nature experiences	37%	95
Family-focused attractions	23%	92
Festivals and events	17%	84
Nightlife	11%	91
Water-based sports	10%	94
Casual sports	8%	76

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	77%	113	74%	120
To escape from routine	47%	98	38%	92
To spend time with family	46%	101	47%	105
To learn through other cultures	23%	106	30%	105
To check off dream travel places	17%	103	26%	108
To have fun with friends	16%	88	17%	94
For adventure and excitement	20%	86	21%	77
To be pampered	16%	140	10%	114
To have memories from top travel spots	8%	95	13%	100

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	55%	106	52%	110
Family / friends wanted to go	34%	106	25%	89
Visiting friends / family	21%	95	27%	92
Special event (e.g., wedding, reunion)	19%	101	19%	97
Festival or event	11%	88	16%	95
Kids wanted to go	18%	95	14%	95

19% 97 INDEX SCORE
Travel aligns with children's school schedule

23% 97 INDEX SCORE
Take time off for vacation during major holidays

11% 92 INDEX SCORE
Difficult to take more than a few days of vacation at once

REFINED GLOBETROTTERS
OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

o We are average planners - no need to wait to the last minute but no need to plan too far ahead.
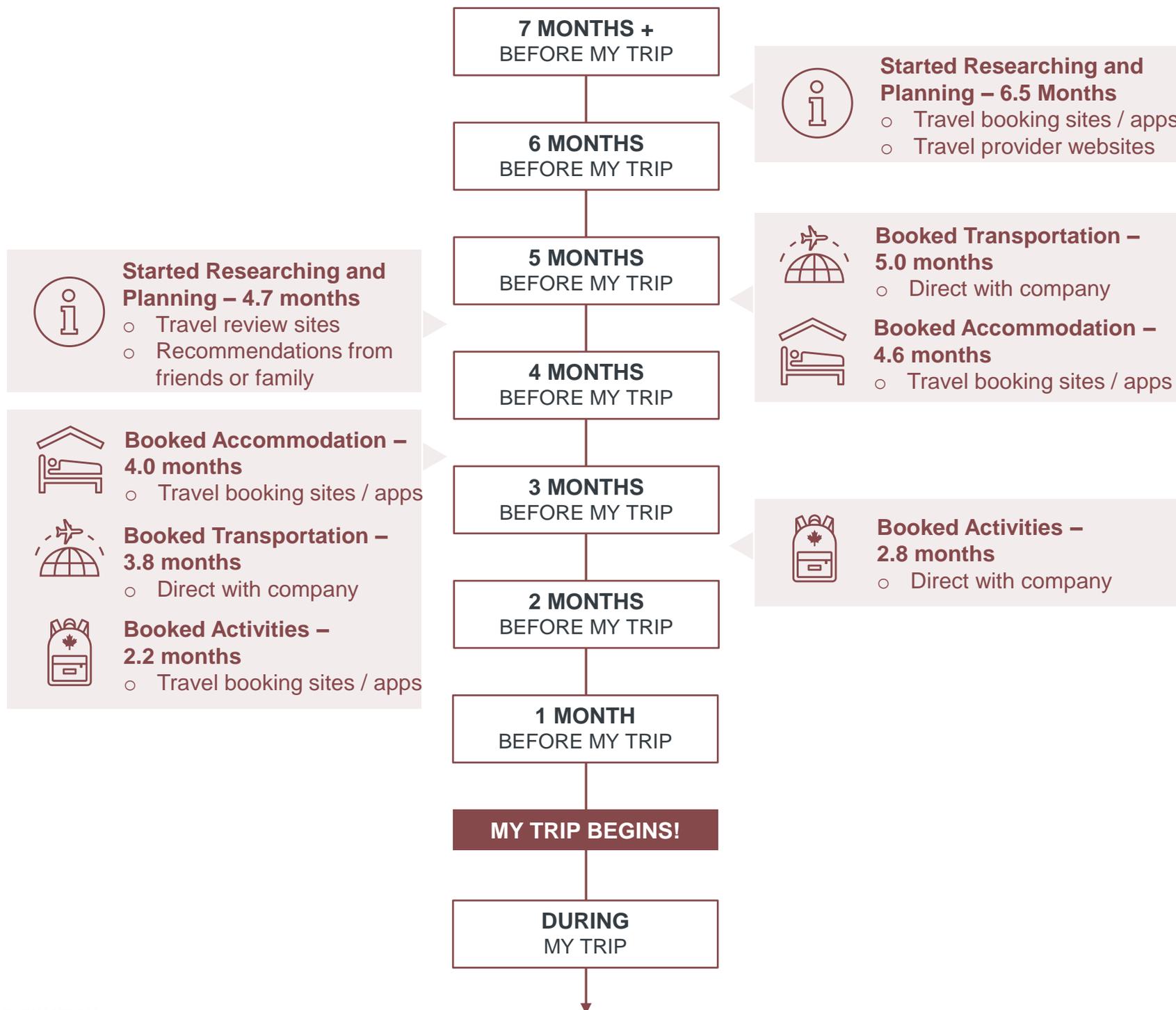
61%
Primary Trip Planner
101 INDEX SCORE

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

o **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

Timeline
7 MONTHS + BEFORE MY TRIP
6 MONTHS BEFORE MY TRIP
5 MONTHS BEFORE MY TRIP
4 MONTHS BEFORE MY TRIP
3 MONTHS BEFORE MY TRIP
2 MONTHS BEFORE MY TRIP
1 MONTH BEFORE MY TRIP
MY TRIP BEGINS!
DURING MY TRIP

FLIGHT OF 7+ HOURS:

Started Researching and Planning – 6.5 Months
o Travel booking sites / apps
o Travel provider websites

Booked Transportation – 5.0 months
o Direct with company

Booked Accommodation – 4.6 months
o Travel booking sites / apps

Booked Activities – 2.8 months
o Direct with company

FLIGHT OF 3–7 HOURS:

Started Researching and Planning – 4.7 months
o Travel review sites
o Recommendations from friends or family

Booked Accommodation – 4.0 months
o Travel booking sites / apps

Booked Transportation – 3.8 months
o Direct with company

Booked Activities – 2.2 months
o Travel booking sites / apps

REFINED GLOBETROTTERS
OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

o Our top trips explore culture in small towns and can seek luxury.
o We also take trips like Simplicity Lovers or City Trippers.

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

o **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   **SEGMENT ALIGNMENT**

48% 147 INDEX SCORE   ● ● ● ● ●

TRIP TYPE	Couples Trip	
DESTINATION TYPE	Beach resort	21%
	Small cities and town	17%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Local restaurants	47%
	Visiting local monuments	29%
	Outdoor markets	19%
KEY BEHAVIOURS	Mid-range budget, most likely to be a cruise	

% OF TOTAL TRIPS   **SEGMENT ALIGNMENT**

9% 111 INDEX SCORE   ● ● ● ● ●

TRIP TYPE	Luxury Resort	
COMPANIONS	Couple only	50%
	Extended family	30%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Security
ACTIVITIES	Local restaurants	32%
	Oceanside beaches	16%
	Souvenir shopping	6%
KEY BEHAVIOURS	Upscale all-inclusive escape with extended family	

% OF TOTAL TRIPS   **SEGMENT ALIGNMENT**

23% 165 INDEX SCORE   ● ● ● ○ ○

TRIP TYPE	Beach Resort	
COMPANIONS	Couple only	51%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Security
ACTIVITIES	Local restaurants	50%
	Souvenir shopping	24%
	Oceanside beaches	17%
KEY BEHAVIOURS	Reliable couples trip to a familiar beach destination	

% OF TOTAL TRIPS   **SEGMENT ALIGNMENT**

12% 122 INDEX SCORE   ● ● ○ ○ ○

TRIP TYPE	Urban Centre	
COMPANIONS	Extended family	25%
	Non-family only	15%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Adventure
ACTIVITIES	Local restaurants	42%
	Museums	41%
	Bars and pubs	38%
KEY BEHAVIOURS	Visiting friends, exploring the bustle of a city and enjoying nightlife	

REFINED GLOBETROTTERS
OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

o We enjoy exploring well-known and developed destinations, with access to nature, through curated experiences.

o We travel everywhere, with a skew towards Europe, North America, South America, and tropical destinations.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	25%	80	France	6%	94
Spain	14%	105	Portugal	4%	119
USA	105	114	Germany	2%	103
Italy	8%	136	Barbados	2%	151
Greece	114	123	Japan	2%	113

WHERE DO WE WANT TO GO

CRUISE DUBAI ITALY COSTA RICA UNITED STATES
PORTUGAL SEVILLE CUBA TOKYO PARIS BALI MEXICO SCANDINAVIA MIDDLE EAST
NEW YORK GREECE INDIA ICELAND
LAS VEGAS SAFARI ROME TURKEY BANGKOK SINGAPORE EGYPT THAILAND ASIA
HAWAII CYPRUS AUSTRALIA PACIFIC ISLANDS
CALIFORNIA BORNEO NORTHERN LIGHTS VIENNA NEW ZEALAND MALDIVES
ALASKA SICILY CARIBBEAN SOUTH AFRICA GALAPAGOS ISLANDS VIETNAM
CANADA CHINA JAMAICA SOUTH AMERICA SPAIN JAPAN

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	40%	120
Has a variety of museums and / or historical sites	38%	124
Renowned for food and drink experiences	37%	137
Has famous attractions	32%	133
Has luxury dining, shopping, and accommodations	28%	148
Provide access to unique natural wonders	26%	114
Provides opportunities to view wildlife in its natural habitat	24%	113
Offers all-inclusive resort packages	23%	138

REFINED GLOBETROTTERS
OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

o We have been to Canada before, but perhaps not recently.

o We are most likely to have visited Ontario and Quebec.

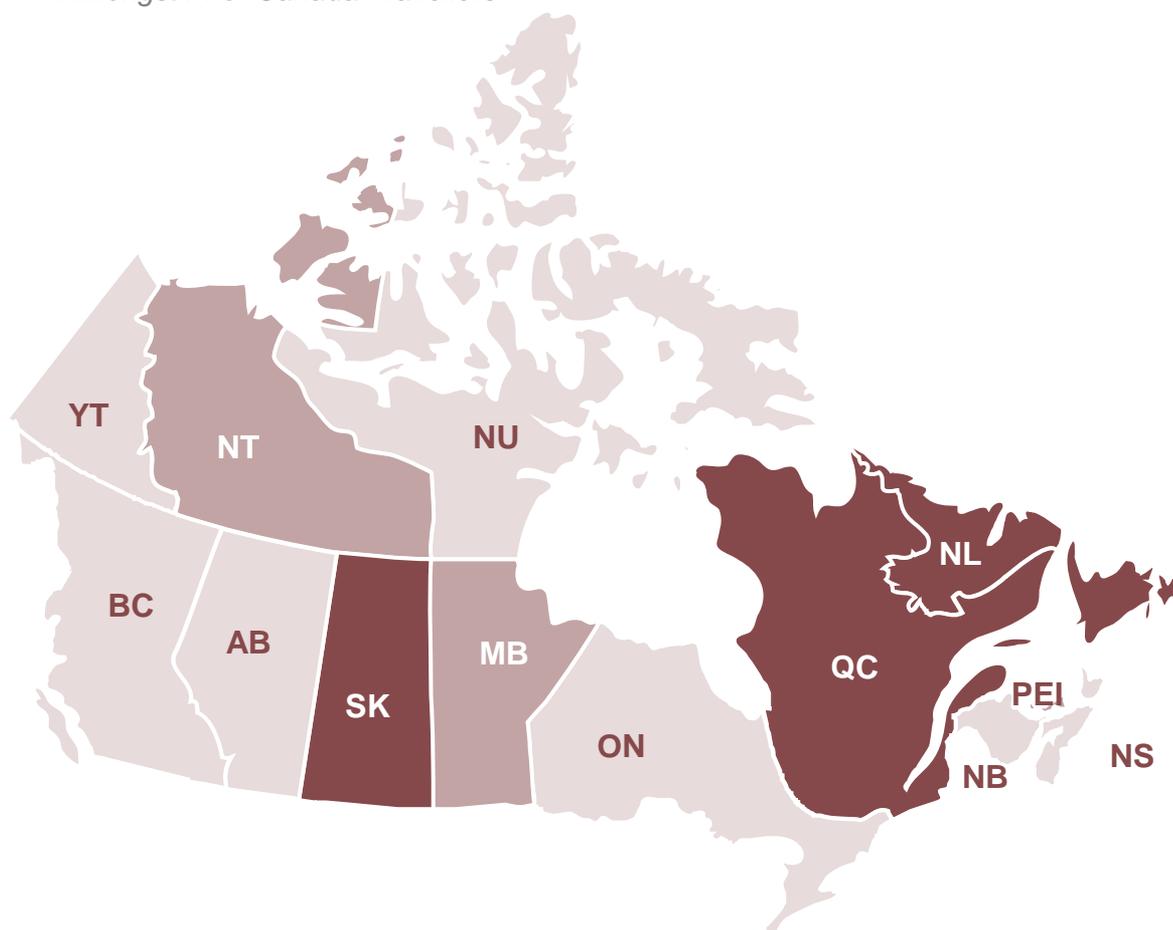o A future trip to Canada could include Vancouver, Toronto, or Quebec.

WHERE DO WE WANT TO GO IN CANADA

BANFF YONGE STREET HAMILTON TORONTO
LAKE LOUISE OTTAWA PRINCE EDWARD ISLAND
NIAGARA FALLS WHISTLER NEWFOUNDLAND
JASPER HALIFAX VANCOUVER CALGARY
BRITISH COLUMBIA ONTARIO NOVA SCOTIA
MONTREAL ROCKIES QUEBEC
ALBERTA YUKON

PROVINCES WE HAVE VISITED BEFORE
Amongst Prior Canada Travellers

PROVINCES	%	INDEX
AB	22%	98
BC	41%	114
MB	7%	117
NB	6%	102
NL	10%	127
NS	13%	111
NT	7%	121
NU	2%	90
ON	50%	114
PEI	8%	120
QC	29%	127
SK	9%	133
YT	4%	111

DESTINATION CANADA

REFINED GLOBETROTTERS
OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

o We have visited Canada in spring, summer, and fall, and have the freedom to travel in any season.

o Overall we are well informed about Canada, but may not feel we need to visit again. We are prioritizing other destinations for now.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	**10%**	**30%**	**45%**	**36%**
VS. TOTAL MARKET	17%	29%	46%	29%

16% Been to Canada in last 5 years
118 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

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

	INDEX
5%	98
9%	110
20%	127
23%	143
43%	80

FAMILIARITY WITH CANADA

- Been To Canada Multiple Times
- Been To Canada Once
- I know a lot about travel in Canada
- I have researched it, but only superficially
- I have heard it, but never looked into it
- I have never heard about travel in Canada

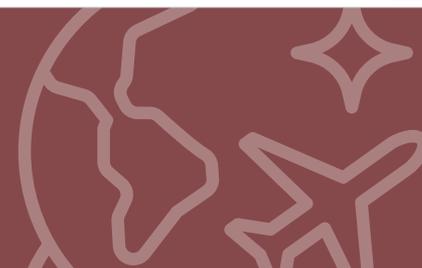|	INDEX
14%	116
19%	135
3%	104
15%	133
40%	69
10%	78
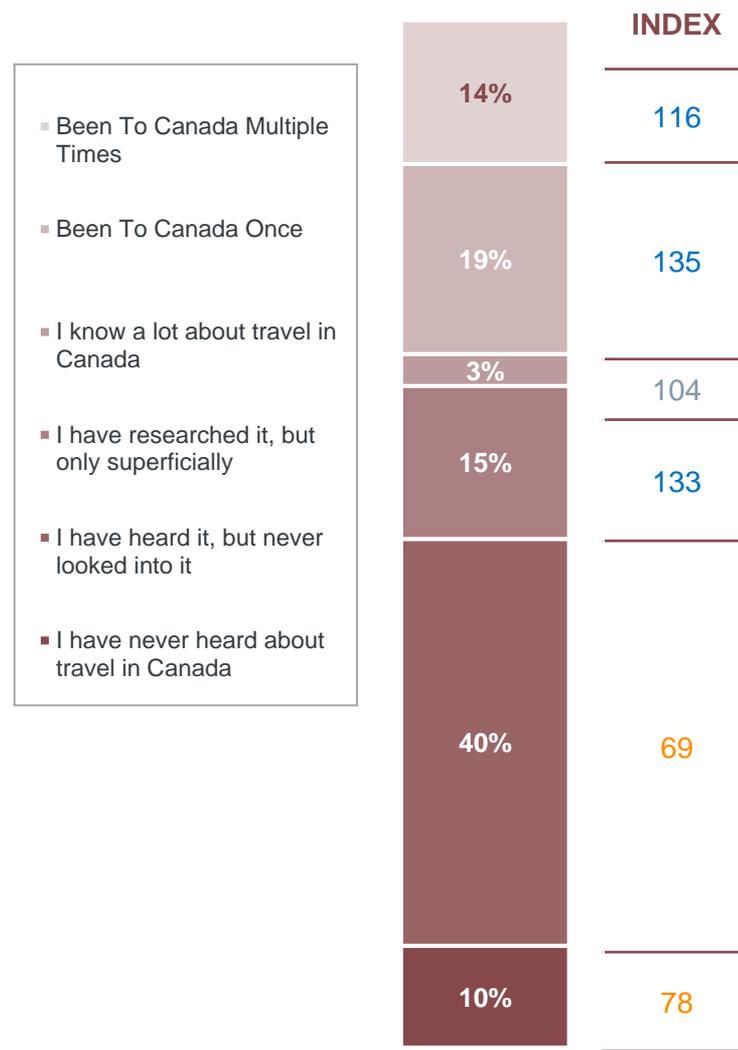
REFINED GLOBETROTTERS
OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

6%	**23%**	**10%**	**7%**
Had a child	Started a new job / career	Bought a new home	Moved to a new city
96 INDEX SCORE	96 INDEX SCORE	91 INDEX SCORE	87 INDEX SCORE
6%	**46%**	**10%**	**25%**
Child started school	Purchased a car	Retired	Renovated house
97 INDEX SCORE	131 INDEX SCORE	103 INDEX SCORE	119 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**77%**	146
Savings and investments	**48%**	104
Experiences (e.g., concerts, events).	**41%**	98
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**35%**	66
Personal care and wellness	**27%**	61
Fashion and accessories	**26%**	116

REFINED GLOBETROTTERS
FIND US ONLINE – MEDIA PROFILING

TOP PUBLICATIONS

	SCORE	INDEX
BBC News	55%	105
Sky News	26%	127
Daily Mail	23%	128
The Guardian	21%	84
The Times	16%	127
ITV News	14%	104
Channel 4 News	12%	115
Financial Times	10%	127
The Telegraph	10%	95
Metro	10%	96
The Independent	8%	95
The Mirror	7%	116
The Economist	6%	98
Evening Standard	5%	94
National Geographic	4%	102
Time Out	3%	105
The Spectator	3%	104
Conde Nast Traveller	2%	104
Wanderlust	2%	95
The New Statesman	1%	72

TOP SOCIAL PLATFORMS

	SCORE	INDEX
Facebook	65%	97
YouTube	53%	86
Instagram	46%	87
Twitter (now X)	28%	91
TikTok	22%	97
Threads	7%	76

TOP TRAVEL PLATFORMS

|	SCORE	INDEX
TripAdvisor	29%	113
Expedia	12%	98
Lonely Planet	3%	64
The Points Guy UK	3%	105
Adventure.com	2%	127
Rough Guide	2%	73
Hand Luggage Only	1%	82

SOURCE: GTRP 2024

This media profiling comes from usage of the long-form Segmentation Typing Tool in Destination Canada's 2024/2025 Global Traveller Research Program custom survey.

Date: December 2024

PURPOSE DRIVEN FAMILIES
PSYCHOGRAPHICS – SUMMARY
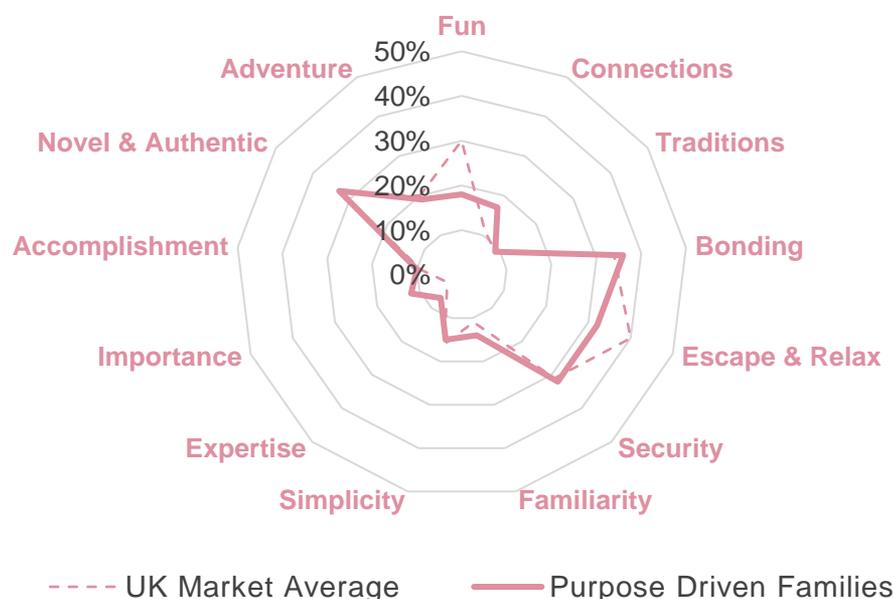
5%

2.5M
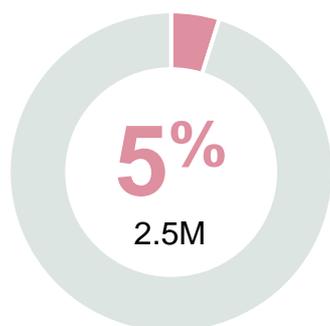
% OF UNITED KINGDOM POPULATION

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

Travel is both a shared accomplishment and a personal journey of learning for the entire family. Cost or difficulty aren't big deterrents; we seek socially responsible, impressive, new experiences.

WHAT YOU NEED TO KNOW ABOUT ME

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

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

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

4 We value and use the expertise of travel agents to ensure we are getting the best experiences.

EMOTIONAL TRAVEL MOTIVATIONS MAP

Fun, Connections, Traditions, Bonding, Escape & Relax, Security, Familiarity, Simplicity, Expertise, Importance, Accomplishment, Novel & Authentic, Adventure

50%, 40%, 30%, 20%, 10%, 0%

- - - - UK Market Average ——— Purpose Driven Families

TRAVELLER RESPONSIBLE INDEX

132

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

116

How is this calculated?

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

PURPOSE DRIVEN FAMILIES
OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

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

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Exploring the world through travel is an important milestone of growing up	85%	127
I like to come back from travels having learnt something new	77%	118
I learn the basics of a language before visiting a country / region	65%	129
Videos and pictures on social media inspire me to travel	53%	136
I love posting my trips on social media to share with friends	49%	125
I feel best on vacation when being highly active	43%	128
I enjoy joining guided tours to explore new destinations	42%	134
When there's a lot of positive buzz about a destination it makes me want to visit it more	42%	134
I seek out destinations where I can explore my ancestral heritage	39%	134
I seek out fine dining experiences and gourmet cuisine when I travel	37%	134
When traveling, I expect 24 / 7 support from a travel provider	37%	137
I seek travel advice from travel agencies and agents	34%	131
I'd be open to using AI-powered chatbots for travel planning and assistance	31%	132

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To have authentic experiences	33%	112
To feel welcomed	30%	125
To feel connected with new people	17%	119
To be familiar with my surroundings	16%	114
To feel like I'm important	12%	149
To push my limits and challenge myself	8%	108

DESIRED DESTINATION

	SCORE	INDEX
Caring	26%	153
Unique	24%	117
Accepting	24%	115
Adventurous	23%	108
Free-Spirited	18%	131
Passionate	15%	123

PURPOSE DRIVEN FAMILIES
OUR DEMOGRAPHICS

OVERALL INSIGHT

o We are parents under 45 years of age, with kids of all ages .

o We attended post-secondary education, are working full-time, and earn comfortable to high incomes.

73%
103 Have a valid passport

GENDER

54% 117 Male

46% 85 Female

0% 83 Non-binary / Other

AGE

	SCORE	INDEX
18-34	**44%**	132
35-54	**47%**	128
55+	**9%**	63
MEAN YEARS	**39.3**	66

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	**17%**	85
>$40K to $120K	**69%**	122
More than $120K	**11%**	115
Refused	**3%**	74

HOUSEHOLD

87% 143 Children <18 Living At Home*

9% 87 Children 18+ Living At Home*

6% 65 Children NOT Living At Home*

7% 59 No Children

Option is not exclusive

EMPLOYMENT

	SCORE	INDEX
Employed FT	**62%**	136
Employed PT	**18%**	124
Self-employed	**6%**	117
Retired	**3%**	64

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	80
Secondary education	**17%**	69
Post-secondary education	**83%**	132

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX		SCORE	INDEX
Greater London	**28%**	141	Scotland	**8%**	93
South East	**11%**	77	South West	**7%**	84
Yorkshire and The Humber	**11%**	127	East Midlands	**6%**	94
West Midlands	**9%**	81	Wales	**5%**	83
North West	**8%**	59	North East	**1%**	44
East of England	**8%**	80			

PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

130

TRAVEL TRADE INDEX: **GROUP**

132

(!) KEY terminology on this page

o **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).

o **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
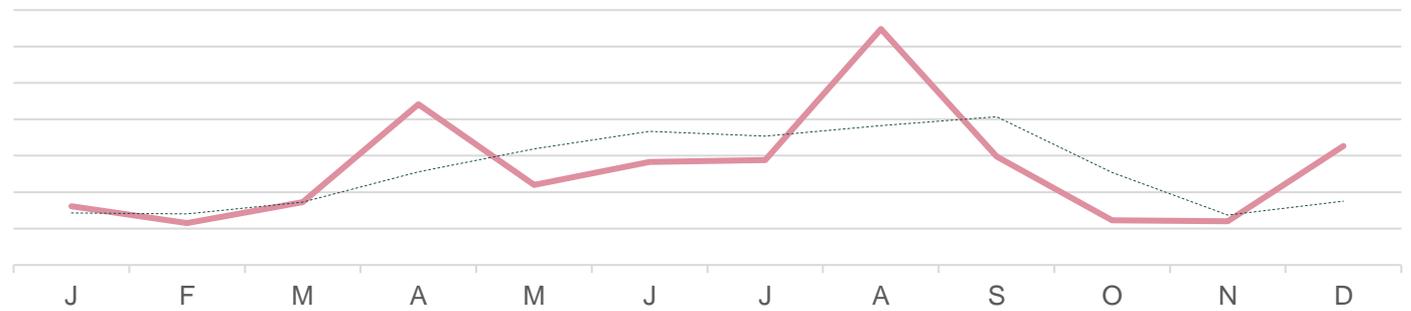
For additional definitions see Glossary

📅 TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours

— Purpose Driven Families
········ Market Average

J F M A M J J A S O N D

For Flights of 7+ Hours

— Purpose Driven Families
········ Market Average

J F M A M J J A S O N D

🧳 TRIP DURATION

	%	INDEX
1-2 Days	38%	109
3-5 Days	23%	102
1 Week Holiday	20%	112
2 Weeks Holiday	9%	93
3 Weeks Or More	7%	114

Incidence is frequency of 2+ times per year

📍 TRIP TYPE

	%	INDEX
Domestic Leisure	42%	81
International Leisure	16%	77
Business Trip	17%	130
Added Personal To Business	12%	147
Worked During Vacation	9%	123

Incidence is frequency of 2+ times per year

PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	40%	86
Premium Hotel	27%	109
Vacation Rental (e.g., Airbnb, Vrbo)	20%	93
All-inclusive resort	19%	105
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	17%	146
Friend's or family's place	15%	92

THOUGHTS ON INDIGENOUS TRAVEL

60%

120 INDEX SCORE

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

12%

111 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	82%	126
You only ever get to know a country by experiencing its culture	77%	121
I like to explore places that are off the beaten path and less explored	56%	106
I'm willing to put in the effort while travelling in order to see lesser-known places	54%	103
I'm open to travelling to destinations with limited tourist infrastructure	46%	102
I'm open to visiting destinations with challenging climates or weather conditions	38%	111

PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

o We travel primarily as a nuclear family.
o Our budgets are generous, as we are seeking a premium experience.

✈ TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	78%	131
Kids	65%	138
Adult relatives	19%	66
Solo	7%	80
Friends	3%	61

💰 BUDGET

AVERAGE SPEND (ALL TRIPS)

$4,530

130
INDEX SCORE

SPEND STYLE

Premium to High-end Luxury

💡 OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	67%	133
I consider the impact that I personally have on the destinations I visit	66%	134
It's important for me to know that the money I spend will support the local economy I'm visiting	57%	114
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	53%	141
Hearing from underrepresented communities is an important part of travelling	50%	124

62%

PRIORITIZE SUSTAINABLE TRAVEL

140 INDEX SCORE

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

o **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."

DESTINATION CANADA

PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

- We like to try the top sports in our destinations, from surfing to snowmobiling to fishing.
- Cultural experiences, festivals, and events are also a highlight.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	53%	124
o Zoos or aquariums	38%	124
o Amusement parks or theme parks	38%	124
o Space or science centres	18%	131
Water-based sports	18%	125
o Swimming	14%	135
o Surfing	10%	155
Winter-based sports	17%	141
o Ice skating or hockey	9%	157
o Snowmobiling	8%	157
Casual sports	14%	127
o Casual biking	7%	143
o Fishing	6%	157
High-intensity sports	11%	129
o Bungee jumping or skydiving	4%	145
o Whitewater rafting	3%	130
Cultural experiences or attractions	53%	91
Local cuisine	40%	81
Nature experiences	40%	102
Shopping	39%	105
Festivals and events	23%	100
Overnight experiences	19%	103
Health and wellness	16%	89

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 relax and unwind	70%	97	64%	91
To spend time with family	52%	108	66%	135
To escape from routine	35%	78	45%	109
For adventure and excitement	31%	115	26%	88
To have fun with friends	16%	89	4%	61
To learn through other cultures	18%	92	15%	76
To check off dream travel places	12%	75	14%	64
To have memories from top travel spots	9%	96	15%	105
For personal reflection and growth	15%	128	9%	111

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	55%	134	66%	146
Partner / spouse wanted to go	75%	145	57%	118
Family / friends wanted to go	37%	115	41%	135
Visiting friends / family	27%	118	41%	139
Special event (e.g., wedding, reunion)	32%	143	38%	139
Festival or event	21%	119	16%	97

61% 140 INDEX SCORE
Travel aligns with children's school schedule

48% 146 INDEX SCORE
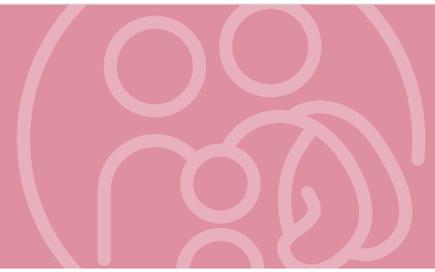**Take time off for vacation during major holidays**

17% 130 INDEX SCORE
Difficult to take more than a few days of vacation at once

PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

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

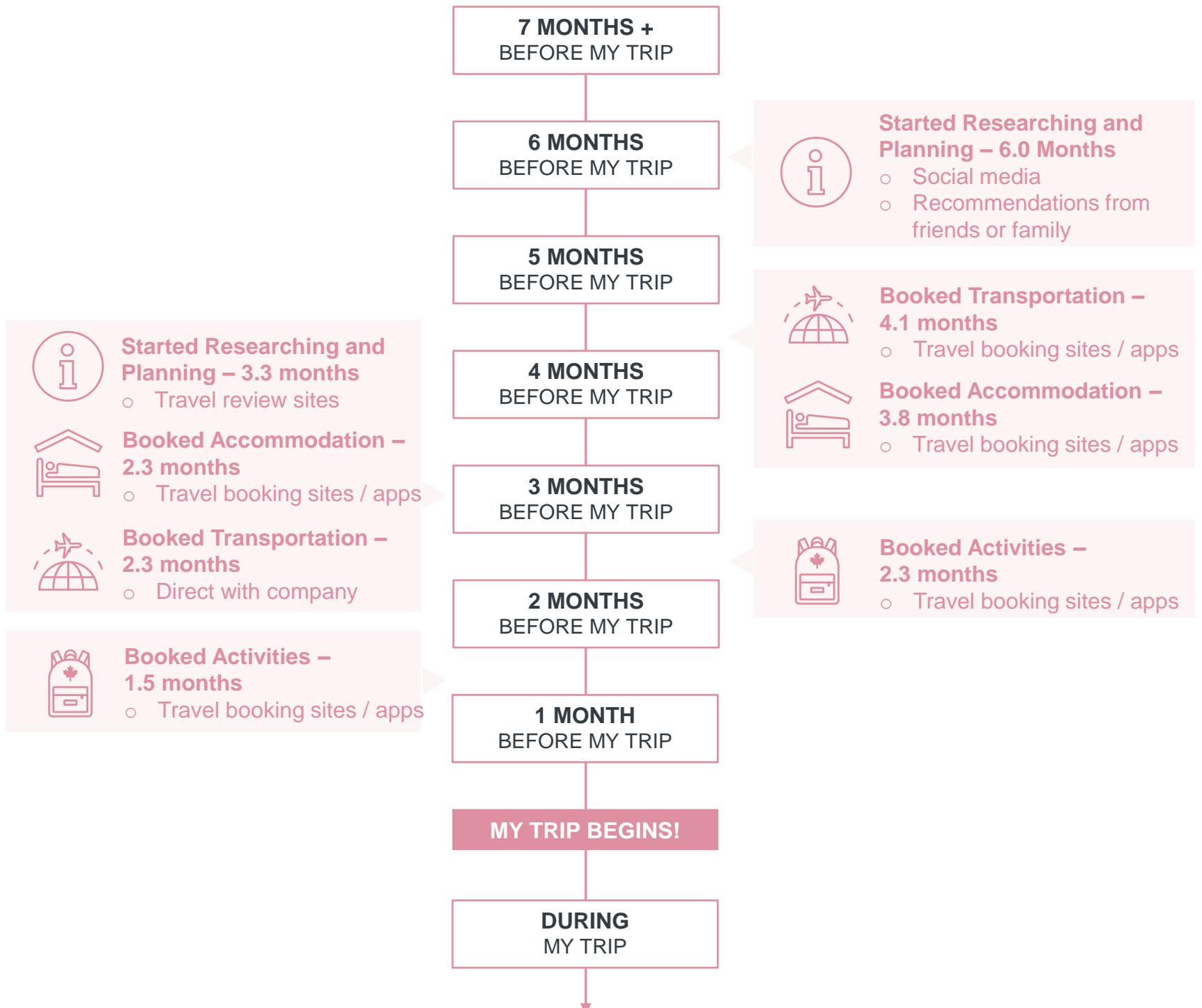**71%**
Primary Trip Planner
125 INDEX SCORE

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

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

FLIGHT OF 3–7 HOURS		FLIGHT OF 7+ HOURS

7 MONTHS + BEFORE MY TRIP

6 MONTHS BEFORE MY TRIP

Started Researching and Planning – 6.0 Months
o Social media
o Recommendations from friends or family

5 MONTHS BEFORE MY TRIP

Started Researching and Planning – 3.3 months
o Travel review sites

Booked Transportation – 4.1 months
o Travel booking sites / apps

4 MONTHS BEFORE MY TRIP

Booked Accommodation – 3.8 months
o Travel booking sites / apps

Booked Accommodation – 2.3 months
o Travel booking sites / apps

3 MONTHS BEFORE MY TRIP

Booked Transportation – 2.3 months
o Direct with company

Booked Activities – 2.3 months
o Travel booking sites / apps

2 MONTHS BEFORE MY TRIP

Booked Activities – 1.5 months
o Travel booking sites / apps

1 MONTH BEFORE MY TRIP

MY TRIP BEGINS!

DURING MY TRIP

PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

o Our top trips explore new places and expose of us to new foods and activities.

o We also take trips like Refined Globetrotters or Fun & Sun Families.

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

o **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   **SEGMENT ALIGNMENT**

13% 125 INDEX SCORE   ● ● ● ● ●

TRIP TYPE	Urban Centre		
COMPANIONS	Nuclear family with kids		64%
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Outdoor markets		35%
	Local restaurants		29%
	Museums		21%
KEY BEHAVIOURS	Closer to home, a quick getaway, may stay in a vacation rental		

% OF TOTAL TRIPS   **SEGMENT ALIGNMENT**

10% 112 INDEX SCORE   ● ● ● ● ●

TRIP TYPE	Luxury Resort		
COMPANIONS	Nuclear family with kids		63%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Security	Bonding
ACTIVITIES	Luxury shopping		76%
	Visiting famous shopping centres		56%
	Nature walks		47%
KEY BEHAVIOURS	Unique and premium, a safe and reliable place for a family vacation		

% OF TOTAL TRIPS   **SEGMENT ALIGNMENT**

23% 167 INDEX SCORE   ● ● ● ○ ○

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		56%
	Extended family		35%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Souvenir shopping		40%
	Local restaurants		33%
	Amusement parks or theme parks		30%
KEY BEHAVIOURS	Focussed on fun, planned well in advance, all for the kids		

% OF TOTAL TRIPS   **SEGMENT ALIGNMENT**

11% 118 INDEX SCORE   ● ● ○ ○ ○

TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		38%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Novel & Authentic	Fun
ACTIVITIES	Visiting local monuments		51%
	Historical or archeological sites		47%
	Local restaurants		35%
KEY BEHAVIOURS	Can include extended family, focussed on bucket-list experience / destination		

PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

o We are looking for kid-friendly access to nature and new cultural experiences.

o Most of our travel is within Europe, but we annually venture further to Asian countries and the Americas.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	27%	85	Italy	4%	93
Spain	12%	90	India	2%	148
France	9%	142	Denmark	2%	155
USA	6%	91	Austria	2%	124
Greece	5%	74	Mexico	2%	157

WHERE DO WE WANT TO GO

AUSTRALIA FRANCE PORTUGAL
CALGARY SCOTLAND
DISNEYLAND BEN NEVIS MAURITIUS MOROCCO CENTRAL AMERICA UZBEKISTAN CARIBBEAN MALDIVES ANTARCTICA BEACH
EUROPE JAMAICA SAFARI AMERICA KENYA PHILIPPINES UKRAINE SOUTH AFRICA BOTSWANA
SINGAPORE ICELAND IRELAND BAHAMAS GREECE
SPAIN ORLANDO FLORIDA NEW ZEALAND ALASKA LANZAROTE SWITZERLAND
THAILAND CANADA CORFU NIGERIA
JAPAN TURKEY DUBAI DOMINICAN REPUBLIC SAUDI ARABIA NEW YORK ITALY
MAJORCA SALEM

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	83%	145
Is inclusive and tolerant	27%	117
Offers natural landscapes in close proximity to city amenities	27%	126
Provide access to unique natural wonders	23%	107
Offers an energetic and dynamic cultural scene	10%	111
Provides a remote, no-frills experience	10%	115
Is a trendy destination	7%	109
Offers options for adrenaline seekers	5%	108

PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – THOUGHTS ON CANADA
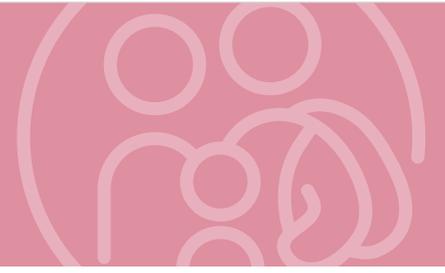
OVERALL INSIGHT

o Our top destinations in Canada so far are Ontario, Quebec and Atlantic provinces.

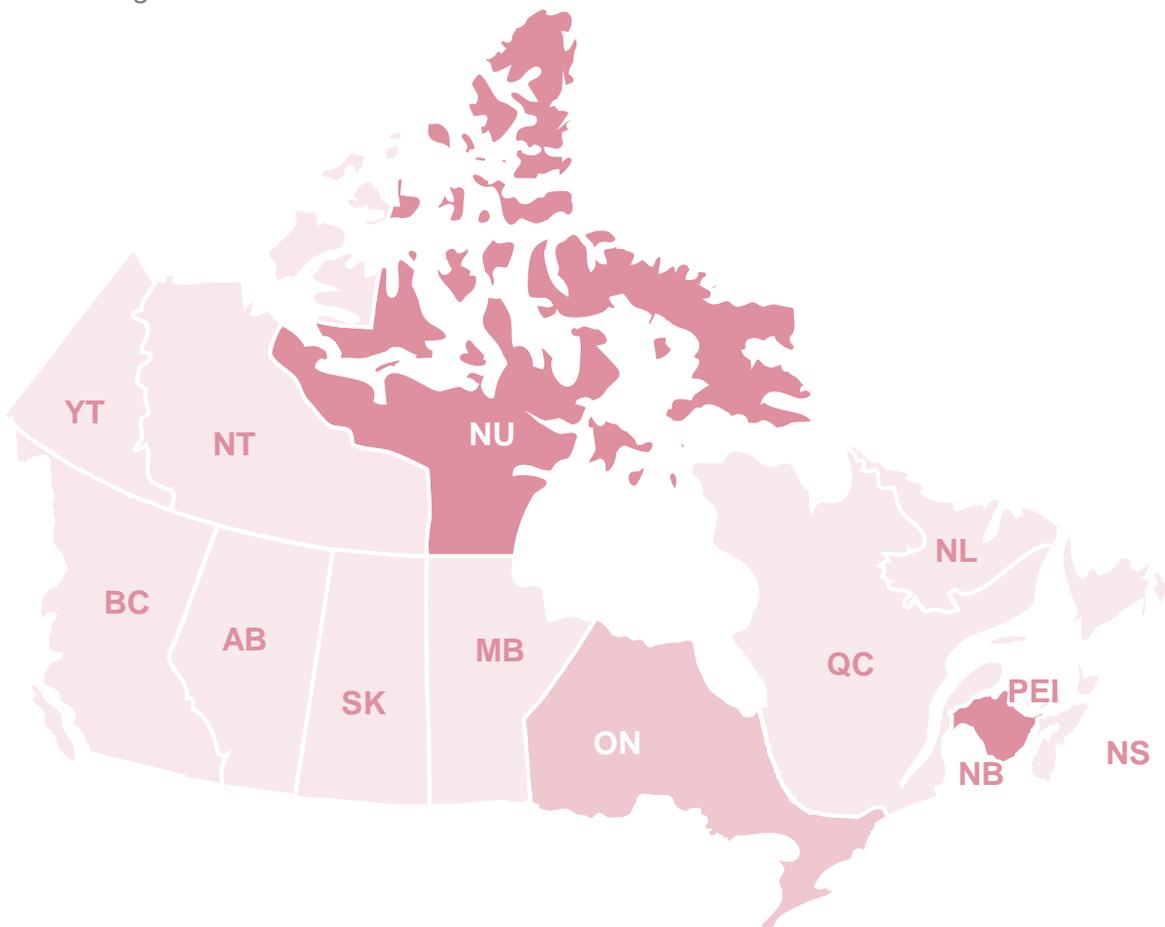o Toronto, Montreal, and Ottawa are top of the list to visit in Canada.

WHERE DO WE WANT TO GO IN CANADA

MONTREAL QUEBEC EAST COAST BANFF
PRINCE EDWARD ISLAND NIAGARA FALLS
CALGARY
ONTARIO TORONTO HAMILTON
KINGSTON VANCOUVER REGINA
OTTAWA YOHO NATIONAL PARK ALBERTA

PROVINCES WE HAVE VISITED BEFORE
Amongst Prior Canada Travellers

PROVINCES	%	INDEX
AB	24%	110
BC	24%	53
MB	0%	68
NB	11%	131
NL	7%	106
NS	7%	85
NT	4%	88
NU	8%	153
ON	51%	115
PEI	4%	79
QC	27%	107
SK	0%	68
YT	4%	108

PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

o Those of us who have visited are repeat visitors. We travel in all months, especially during winter holiday.

o If we haven't been yet, we would like to in the next few years.

o We have good familiarity with Canada.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	**34%**	**28%**	**37%**	**13%**
VS. TOTAL MARKET	17%	29%	46%	29%

16% Been to Canada in last 5 years
121 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS
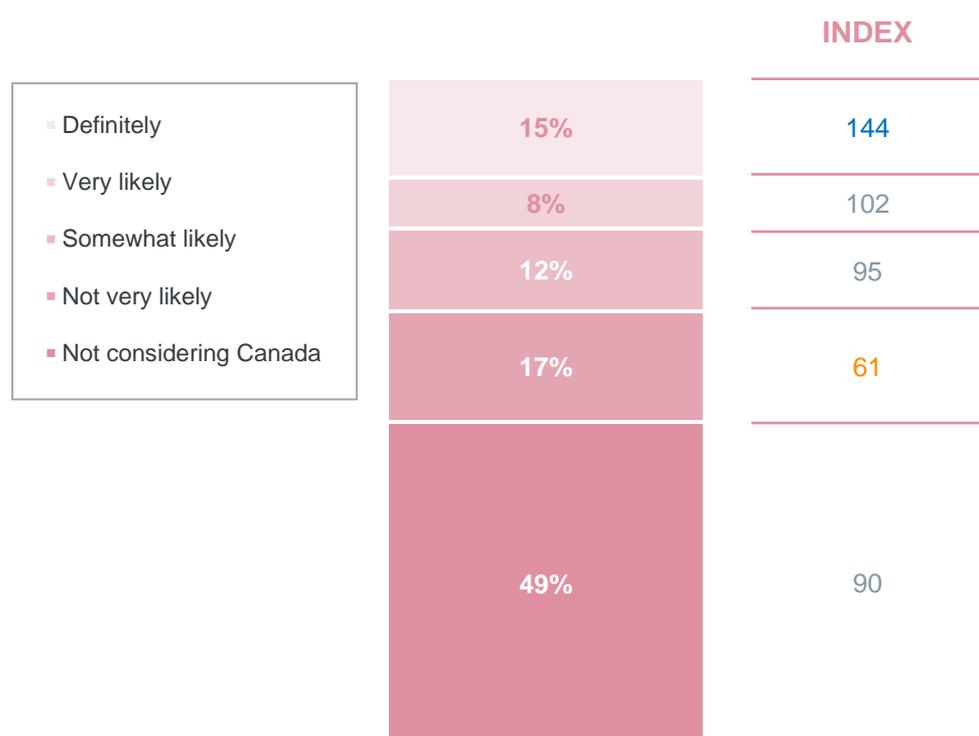
- Definitely
- Very likely
- Somewhat likely
- Not very likely
- Not considering Canada

%	INDEX
15%	144
8%	102
12%	95
17%	61
49%	90

FAMILIARITY WITH CANADA

- Been To Canada Multiple Times
- Been To Canada Once
- I know a lot about travel in Canada
- I have researched it, but only superficially
- I have heard it, but never looked into it
- I have never heard about travel in Canada

%	INDEX
12%	106
13%	99
8%	159
13%	115
41%	78
14%	89
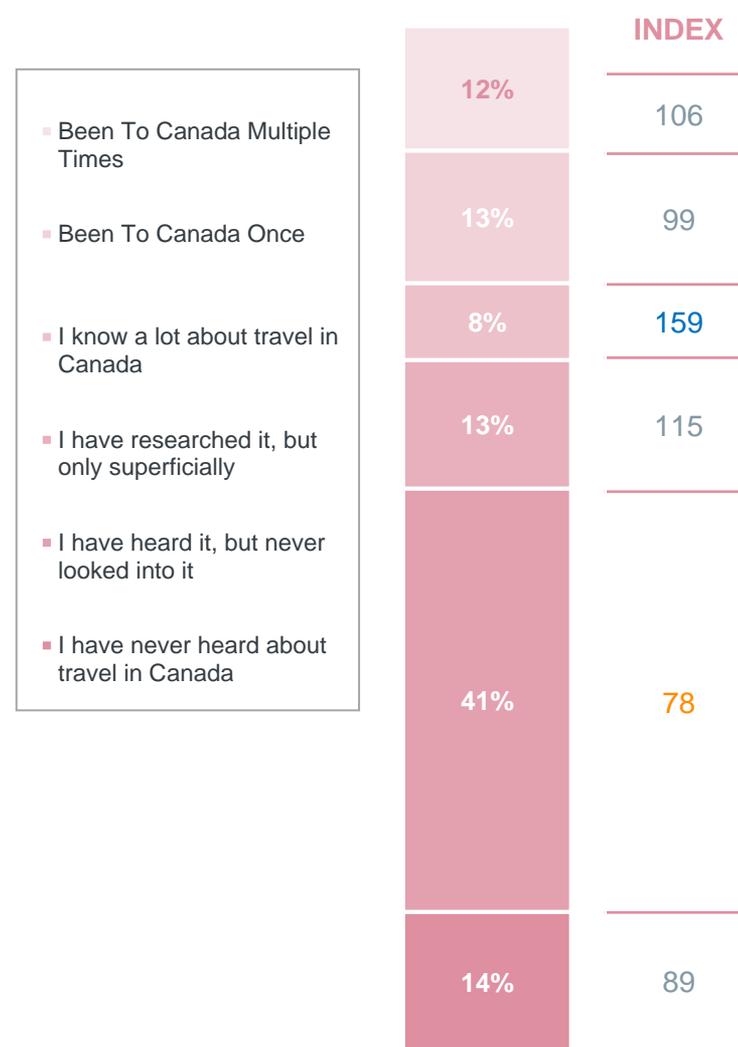
PURPOSE DRIVEN FAMILIES
OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

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

26%
Had a child
140 INDEX SCORE

26%
Started a new job / career
106 INDEX SCORE

21%
Bought a new home
146 INDEX SCORE

11%
Moved to a new city
108 INDEX SCORE

33%
Child started school
148 INDEX SCORE

48%
Purchased a car
139 INDEX SCORE

1%
Retired
61 INDEX SCORE

24%
Renovated house
114 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	57%	85
Savings and investments	46%	96
Experiences (e.g., concerts, events).	36%	81
Personal care and wellness	34%	124
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	33%	57
Home and decor	29%	117

PURPOSE DRIVEN FAMILIES
FIND US ONLINE – MEDIA PROFILING

TOP PUBLICATIONS

	SCORE	INDEX
BBC News	55%	105
Sky News	29%	142
The Guardian	28%	110
ITV News	24%	179
Daily Mail	22%	121
Financial Times	20%	239
The Telegraph	15%	137
The Mirror	15%	249
The Times	15%	123
The Independent	15%	176
Metro	14%	139
Channel 4 News	14%	139
The Economist	12%	185
Time Out	9%	312
Evening Standard	7%	130
National Geographic	7%	168
The New Statesman	6%	294
Wanderlust	6%	326
The Spectator	2%	87
Conde Nast Traveller	2%	141

TOP SOCIAL PLATFORMS

	SCORE	INDEX
YouTube	79%	128
Facebook	73%	109
Instagram	64%	120
Twitter (now X)	51%	163
TikTok	39%	170
Threads	13%	145

TOP TRAVEL PLATFORMS

|	SCORE	INDEX
TripAdvisor	24%	94
Expedia	24%	208
Lonely Planet	10%	199
The Points Guy UK	7%	216
Adventure.com	6%	330
Rough Guide	5%	203
Hand Luggage Only	2%	168

SOURCE: GTRP 2024

This media profiling comes from usage of the long-form Segmentation Typing Tool in Destination Canada's 2024/2025 Global Traveller Research Program custom survey.

Date: December 2024

CITY TRIPPERS
PSYCHOGRAPHICS – SUMMARY

9%
4.9M
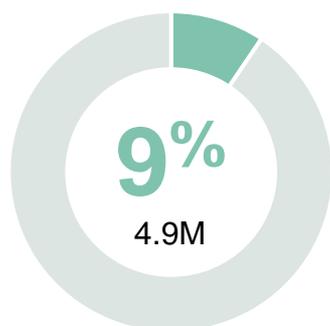
% OF UNITED KINGDOM POPULATION

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

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

WHAT YOU NEED TO KNOW ABOUT ME

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

2 Our travels are about collecting personal experiences, not luxury or education.

3 We like the freedom to explore without an agenda, and disconnect from everyday life.

4 Easy access to trendy hotspots is important, as we like to see and do as much as possible. If a destination garners a lot of positive buzz, it heightens our desire to visit.

EMOTIONAL TRAVEL MOTIVATIONS MAP

- - - - UK Market Average ——— City Trippers
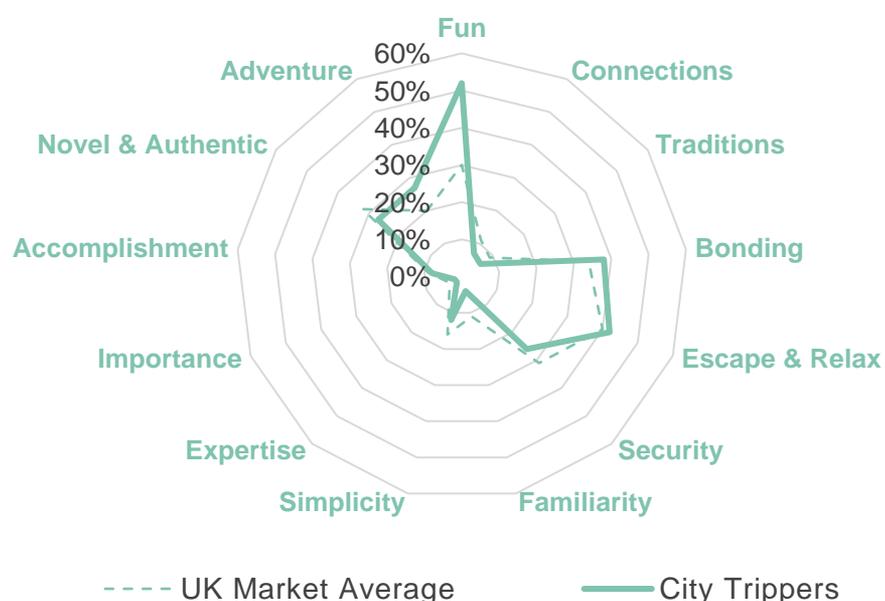
TRAVELLER RESPONSIBLE INDEX
85

How is this calculated?

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

TRAVELLER ECONOMIC INDEX
87

How is this calculated?

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

CITY TRIPPERS
OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

o We select destinations that offer a fun, social setting, allowing us to fully indulge and live in the moment.

o We seek experiences that we can be proud of, and that we look forward to sharing with others.

o We prefer self-guided experiences in well established tourism destinations.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	90%	147
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	79%	118
I enjoy the freedom of exploring new destinations without guided tours	76%	125
I prefer destinations with well-established tourist infrastructure	66%	120
I generally don't think much on the impact that I personally have on the destinations I visit	66%	122
I generally stick to the most popular areas when I visit somewhere	63%	121
I make sure to visit the "famous" sites wherever I go	58%	131
I like natural attractions but I don't usually think they are the highlights of my trip	56%	119
I love posting my trips on social media to share with friends	50%	126
Videos and pictures on social media inspire me to travel	49%	129
I'm more interested in the present and don't focus much on the history of where I visit	45%	128
When there's a lot of positive buzz about a destination it makes me want to visit it more	43%	138
I enjoy the beauty of nature without reflecting too much on its significance	43%	144

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To just enjoy myself and have fun	70%	132
To have a fun, social setting	49%	151
To indulge myself and live in the moment	46%	147
To let loose and forget about day-to-day life	33%	117
To feel a sense of adventure	29%	112
To be proud to share my travel experiences	25%	124

DESIRED DESTINATION

	SCORE	INDEX
Fun	71%	148
Friendly	66%	114
Sociable	34%	144
Charming	26%	115
Accepting	23%	112
Trendy	11%	142

CITY TRIPPERS
OUR DEMOGRAPHICS

OVERALL INSIGHT

o We represent a diverse age range, working full-time, earning a low-medium income.

o Many of us are not parents, or our children are older and not living at home anymore.

68%
92   Have a valid passport

GENDER

42% 82 Male

58% 118 Female

0% 83 Non-binary / Other

AGE

	SCORE	INDEX
18-34	**39%**	122
35-54	**31%**	96
55+	**31%**	89
MEAN YEARS	**43.6**	81

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	**27%**	128
>$40K to $120K	**63%**	68
More than $120K	**6%**	75
Refused	**5%**	124

HOUSEHOLD

22% 95 Children <18 Living At Home*

10% 91 Children 18+ Living At Home*

18% 86 Children NOT Living At Home*

60% 117 No Children

Option is not exclusive

EMPLOYMENT

	SCORE	INDEX
Employed FT	**45%**	98
Employed PT	**16%**	116
Self-employed	**4%**	93
Retired	**16%**	85

EDUCATION

	SCORE	INDEX
Primary education or less	**0%**	80
Secondary education	**33%**	117
Post-secondary education	**67%**	84

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX		SCORE	INDEX
Greater London	**15%**	97	South West	**9%**	107
North West	**13%**	135	Scotland	**9%**	109
West Midlands	**11%**	133	Wales	**5%**	113
Yorkshire and The Humber	**10%**	122	East Midlands	**4%**	77
East of England	**10%**	107	North East	**4%**	88
South East	**9%**	50			

CITY TRIPPERS
OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

74

TRAVEL TRADE INDEX: **GROUP**
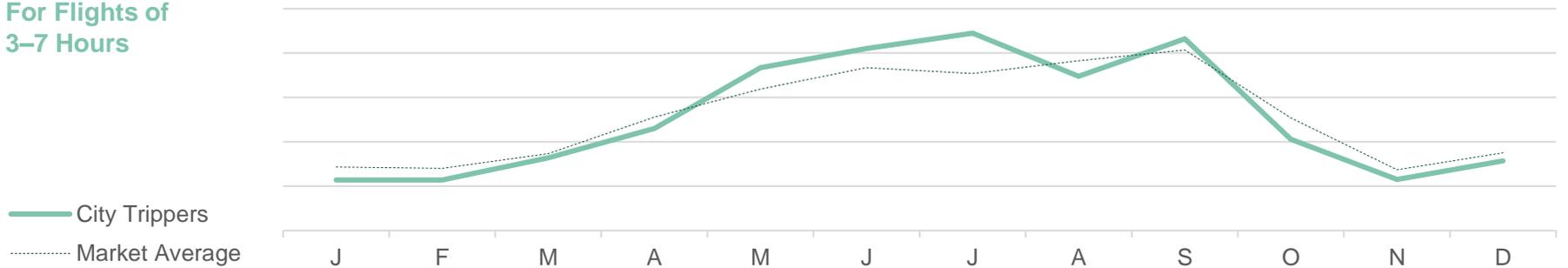
89

① KEY terminology on this page

- o **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).

- o **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
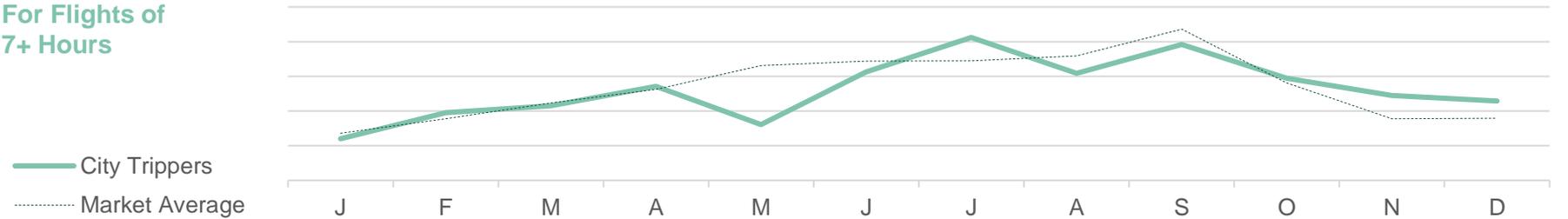
For additional definitions see Glossary

📅 TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours

— City Trippers
····· Market Average

J F M A M J J A S O N D

For Flights of 7+ Hours

— City Trippers
····· Market Average

J F M A M J J A S O N D

🧳 TRIP DURATION

		INDEX
1-2 Days	**40%**	122
3-5 Days	**19%**	83
1 Week Holiday	**14%**	79
2 Weeks Holiday	**6%**	79
3 Weeks Or More	**2%**	74

Incidence is frequency of 2+ times per year

📍 TRIP TYPE

		INDEX
Domestic Leisure	**40%**	64
International Leisure	**29%**	109
Business Trip	**4%**	78
Added Personal To Business	**1%**	82
Worked During Vacation	**2%**	82

Incidence is frequency of 2+ times per year

CITY TRIPPERS
OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	53%	140
Premium Hotel	22%	96
All-inclusive resort	21%	114
Vacation Rental (e.g., Airbnb, Vrbo)	21%	99
Friend's or family's place	16%	107
Budget Hotel	15%	120

THOUGHTS ON INDIGENOUS TRAVEL

39%
82 INDEX SCORE

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

5%
81 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	76%	116
I really want to learn about the history of the destinations I visit	55%	72
I'm willing to put in the effort while travelling in order to see lesser-known places	46%	91
I like to explore places that are off the beaten path and less explored	37%	79
I'm open to travelling to destinations with limited tourist infrastructure	34%	80
I'm open to visiting destinations with challenging climates or weather conditions	23%	87

CITY TRIPPERS
OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	51%	79
Adult relatives	28%	134
Friends	19%	136
Kids	15%	94
Solo	11%	97

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,810

81
INDEX SCORE

SPEND STYLE
Mid-range

OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important for me to know that the money I spend will support the local economy I'm visiting	48%	87
It's important to me that I visit somewhere that is open to diversity and inclusion	46%	100
I consider the impact that I personally have on the destinations I visit	34%	78
Hearing from underrepresented communities is an important part of travelling	25%	85
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	21%	82

32%

PRIORITIZE SUSTAINABLE TRAVEL

89 INDEX SCORE

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

o **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

o We enjoy shopping, dining, and explore the nightlife.
o Festivals, cultural events and concerts are our style, and we aren't really interested in winter or outdoor activities.

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	59%	116
o Local restaurants	52%	118
o Street cuisine	33%	128
o Cafes or bakeries	34%	125
Shopping	53%	135
o Outdoor markets	33%	131
o Visiting famous shopping centres or areas	29%	140
Nightlife	40%	157
o Bars and pubs	36%	158
o Clubs and dancing	17%	155
Festivals and events	36%	129
o Music concerts or festivals	28%	140
o Sporting events	12%	141
Family-focused attractions	35%	105
o Amusement parks or theme parks	26%	108
o Zoos or aquariums	20%	101
Cultural experiences or attractions	50%	86
Nature experiences	25%	66
Guided tours	23%	96
Health and wellness	20%	120
Overnight experiences	16%	94
Water-based sports	10%	95
Casual sports	8%	78

CITY TRIPPERS
OUR BEHAVIOURS – WHY WE TRAVEL

INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	76%	111	62%	84
To escape from routine	56%	114	46%	109
To spend time with family	43%	97	42%	98
To have fun with friends	36%	138	32%	135
For adventure and excitement	27%	106	46%	133
To check off dream travel places	14%	84	18%	78
For a romantic getaway	15%	112	12%	109
To have memories from top travel spots	7%	87	14%	102
To learn through other cultures	12%	73	18%	82

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	45%	144	37%	123
Partner / spouse wanted to go	40%	78	35%	81
Visiting friends / family	22%	100	28%	97
Special event (e.g., wedding, reunion)	19%	101	14%	86
Festival or event	14%	97	21%	113
Kids wanted to go	12%	88	21%	102

14% 92 INDEX SCORE
Travel aligns with children's school schedule

26% 104 INDEX SCORE
Take time off for vacation during major holidays

8% 74 INDEX SCORE
Difficult to take more than a few days of vacation at once

CITY TRIPPERS
OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

o We are planners, thinking about trips months in advance. We will secure transportation and accommodation but leave activities until later.
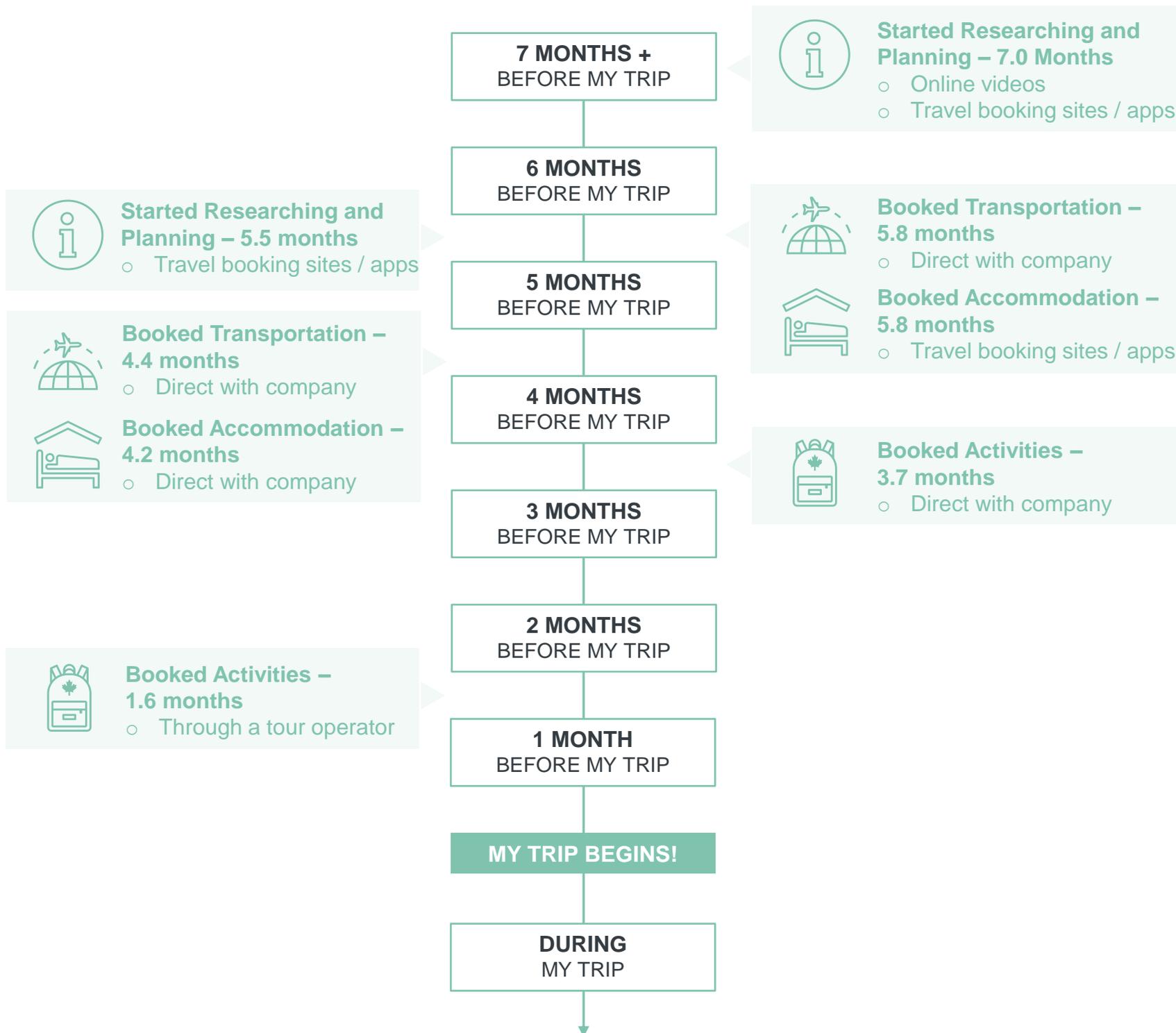
57%

Primary Trip Planner

91 INDEX SCORE

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

o **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

Started Researching and Planning – 5.5 months
o Travel booking sites / apps

Booked Transportation – 4.4 months
o Direct with company

Booked Accommodation – 4.2 months
o Direct with company

Booked Activities – 1.6 months
o Through a tour operator

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

Started Researching and Planning – 7.0 Months
o Online videos
o Travel booking sites / apps

Booked Transportation – 5.8 months
o Direct with company

Booked Accommodation – 5.8 months
o Travel booking sites / apps

Booked Activities – 3.7 months
o Direct with company

CITY TRIPPERS
OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

o Most of our trips are to destinations focussed on fun.
o We also take couples trips like Simplicity Lovers.

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

o **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 **SEGMENT ALIGNMENT**

16% 132 INDEX SCORE   ● ● ● ● ●

TRIP TYPE	Urban Centre	
COMPANIONS	Couple only	28%
	Non-family only	15%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Adventure
ACTIVITIES	Local restaurants	42%
	Museums	41%
	Visiting famous shopping centres	28%
KEY BEHAVIOURS	City trip with partner and friends, famous attractions and experiencing nightlife	

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

16% 98 INDEX SCORE   ● ● ● ● ●

TRIP TYPE	Friends Trip	
DESTINATION TYPE	Beach resort	32%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Bonding
ACTIVITIES	Bars and pubs	51%
	Local restaurants	44%
	Clubs and dancing	27%
KEY BEHAVIOURS	All about fun, nightlife and relaxation with friends, needing a mild comfortable climate	

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

33% 137 INDEX SCORE   ● ● ● ○ ○

TRIP TYPE	Couples Trip	
DESTINATION TYPE	Beach resort	32%
	Countryside and village	24%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Security
ACTIVITIES	Local restaurants	38%
	Outdoor markets	21%
	Nature walks	19%
KEY BEHAVIOURS	Safe, quiet, and reliable couples getaway to escape and relax	

% OF TOTAL TRIPS **SEGMENT ALIGNMENT**

27% 168 INDEX SCORE   ● ● ● ○ ○

TRIP TYPE	Beach Resort	
COMPANIONS	Couple only	51%
	Extended family	22%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Security
ACTIVITIES	Local restaurants	50%
	Cafes or bakeries	27%
	Souvenir shopping	24%
KEY BEHAVIOURS	All-inclusive trip to unwind with partner and extended family	

CITY TRIPPERS
OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

o We seek trendy locations with ease of travel, where festivals, famous attractions, and nightlife are abundant.

o Our travel mainly spans United Kingdom and Europe. Top places in Europe are Spain, Portugal, France, Greece and Italy.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	30%	90	Portugal	5%	131
Spain	21%	145	Italy	3%	88
USA	8%	119	Germany	2%	117
France	5%	86	Thailand	2%	133
Greece	5%	79	Netherlands	2%	136

WHERE DO WE WANT TO GO

AMERICA HAWAII NEW YORK JAMAICA EUROPE
COPENHAGEN ALASKA PERU DISNEY
ARGENTINA GREECE THAILAND CANADA
MALDIVES BENIDORM TURKEY NORTHERN LIGHTS
FLORIDA LONDON ICELAND JAPAN SAN FRANCISCO GRAN CANARIA
BARBADOS SPAIN PARIS
MEXICO TOKYO BARCELONA AMSTERDAM CANARY ISLANDS CRUISE
BUDAPEST BALI CUBA NEW ZEALAND SCOTLAND
BERLIN ANTARCTICA GERMANY
CARIBBEAN AUSTRALIA MINORCA DUBAI ITALY
LISBON

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is easy to travel around once there	60%	127
Has famous attractions	32%	134
Renowned for food and drink experiences	31%	123
Has vibrant nightlife and entertainment	26%	151
Has well-developed tourism infrastructure	23%	141
Provides a bustling and vibrant city vibe	17%	141
Provides a variety of local festivals and events	17%	115
Is a trendy destination	9%	127

CITY TRIPPERS
OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

○ We haven't really travelled to Canada and are unlikely to travel in the next few years.

○ If we have visited, it was many years ago. Most likely to BC, Ontario or Nova Scotia.

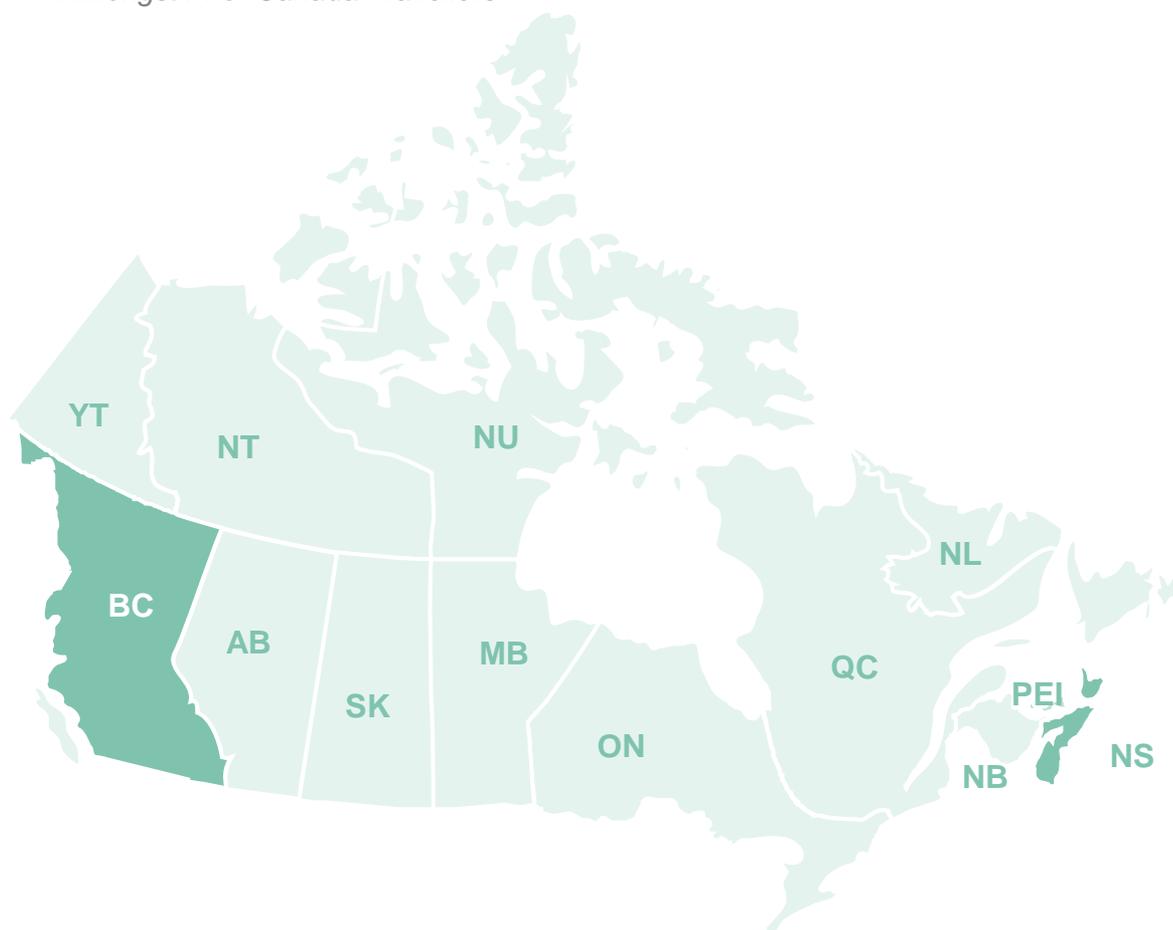○ Any future trip would similarly explore Vancouver or Toronto.

WHERE DO WE WANT TO GO IN CANADA

MONTREAL QUEBEC CITY TORONTO
NIAGARA FALLS
VANCOUVER
OTTAWA BRITISH COLUMBIA
ALBERTA PRINCE EDWARD ISLAND

PROVINCES WE HAVE VISITED BEFORE
Amongst Prior Canada Travellers

PROVINCES	%	INDEX
AB	22%	101
BC	45%	127
MB	3%	86
NB	2%	79
NL	2%	74
NS	17%	125
NT	5%	99
NU	2%	97
ON	48%	102
PEI	7%	117
QC	25%	92
SK	3%	89
YT	0%	60

DESTINATION CANADA

CITY TRIPPERS
OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

○ When we have visited Canada we have travelled in the summer months.

○ We don't really know too much about what Canada has to offer.

○ To consider Canada we would need to learn about must-see attractions, trendy cities, and how we can easily access all of this.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	**20%**	**29%**	**59%**	**12%**
VS. TOTAL MARKET	17%	29%	46%	29%

6%
Been to Canada in last 5 years
81 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

		INDEX
■ Definitely	1%	81
■ Very likely	4%	82
■ Somewhat likely	14%	102
■ Not very likely	19%	95
■ Not considering Canada	61%	113

FAMILIARITY WITH CANADA

		INDEX
■ Been To Canada Multiple Times	5%	70
	11%	87
■ Been To Canada Once	3%	100
	7%	74
■ I know a lot about travel in Canada		
■ I have researched it, but only superficially		
■ I have heard it, but never looked into it	51%	129
■ I have never heard about travel in Canada	24%	118
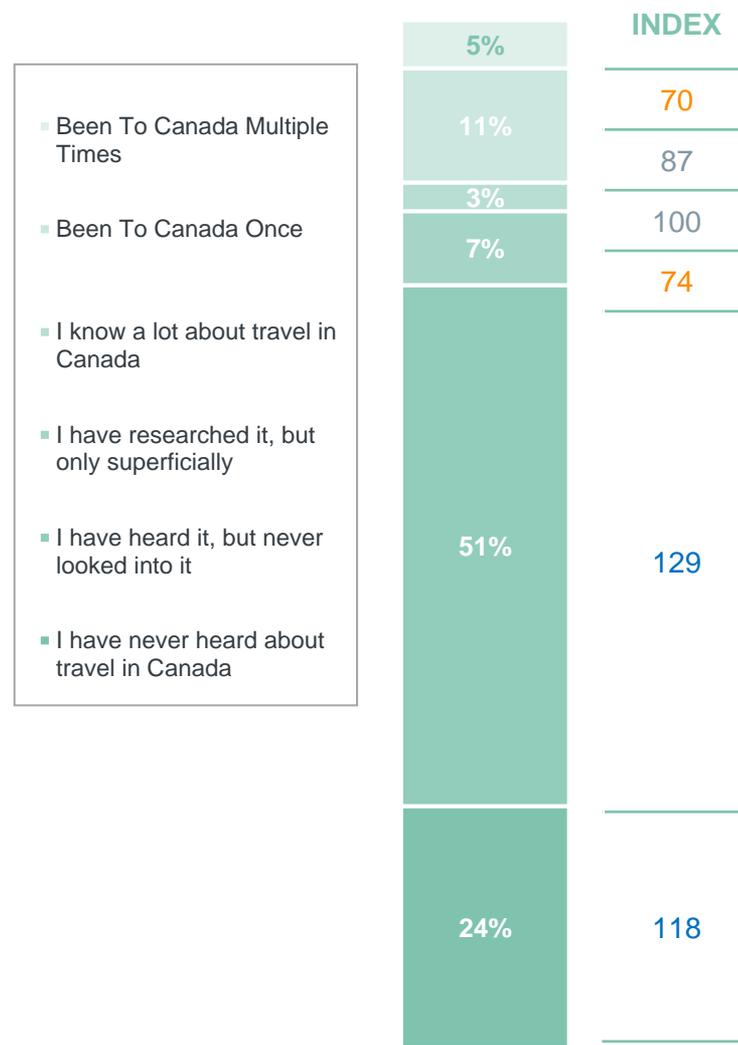
CITY TRIPPERS
OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

o In recent years we have embarked on memorable leisure travels, purchased a new car, and invested in our home.

o Some of us have started new jobs or careers, and even relocated to new cities.

MAJOR LIFE EVENTS IN LAST 5 YEARS

5%
Had a child
94 INDEX SCORE

30%
Started a new job / career
119 INDEX SCORE

12%
Bought a new home
100 INDEX SCORE

12%
Moved to a new city
113 INDEX SCORE

3%
Child started school
91 INDEX SCORE

31%
Purchased a car
81 INDEX SCORE

10%
Retired
99 INDEX SCORE

20%
Renovated house
86 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	63%	104
Experiences (e.g., concerts, events).	53%	140
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	41%	98
Savings and investments	41%	80
Fashion and accessories	33%	146
Personal care and wellness	33%	110

CITY TRIPPERS
FIND US ONLINE – MEDIA PROFILING

TOP PUBLICATIONS

	SCORE	INDEX
BBC News	47%	90
The Guardian	21%	81
Sky News	19%	93
Daily Mail	15%	83
ITV News	13%	92
The Times	11%	88
Metro	10%	98
Channel 4 News	9%	87
The Independent	8%	89
The Telegraph	8%	69
Financial Times	5%	66
The Economist	5%	78
The Mirror	3%	54
National Geographic	3%	66
Evening Standard	2%	40
The Spectator	2%	60
Time Out	1%	36
The New Statesman	1%	27
Wanderlust	-	-
Conde Nast Traveller	-	-

TOP SOCIAL PLATFORMS

	SCORE	INDEX
YouTube	71%	114
Facebook	70%	103
Instagram	66%	124
Twitter (now X)	44%	142
TikTok	38%	163
Threads	11%	130

TOP TRAVEL PLATFORMS

	SCORE	INDEX
TripAdvisor	26%	100
Expedia	11%	92
Lonely Planet	4%	73
Hand Luggage Only	1%	40
Adventure.com	1%	62
Rough Guide	1%	47
The Points Guy UK	-	-

SOURCE: GTRP 2024

This media profiling comes from usage of the long-form Segmentation Typing Tool in Destination Canada's 2024/2025 Global Traveller Research Program custom survey.

Date: December 2024

SIMPLICITY LOVERS
PSYCHOGRAPHICS – SUMMARY

18%
9.4M
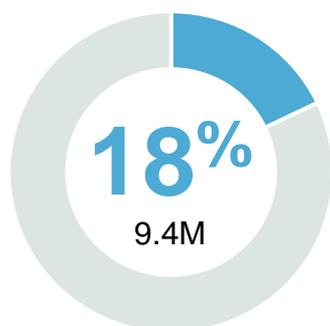
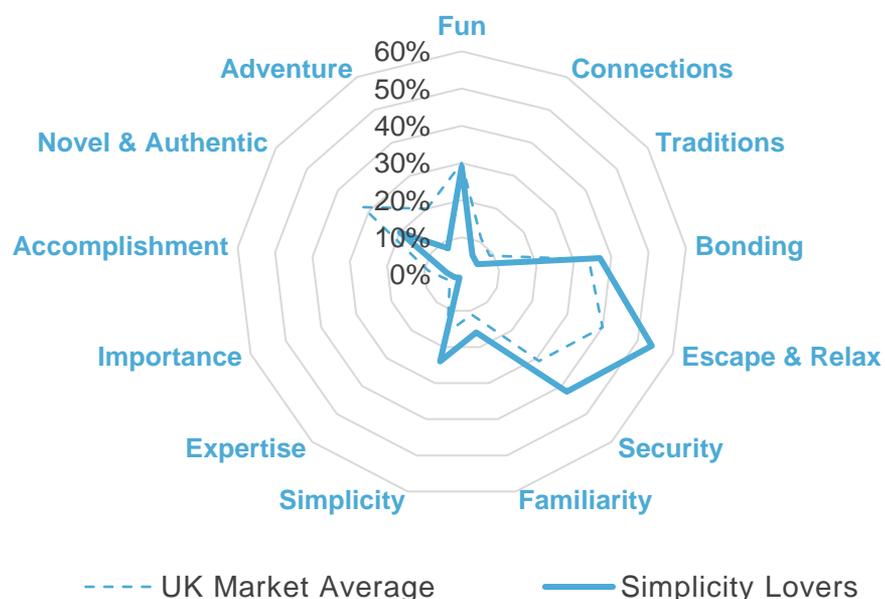## % OF UNITED KINGDOM POPULATION

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 with a small-town feel.

2 We like to take it slow, with low impact activities. We don't prioritize fitting in physical activity during our trips, but enjoy a quiet walk in nature or seeing the countryside of a small town.

3 Loyal to regular destinations, we are creatures of habit who favor simplicity and serenity over glitz, glamour, and cultural immersion.

4 Hard-to-reach destinations don't attract us, we want ease of access and don't want to worry about how to navigate once we arrive.

EMOTIONAL TRAVEL MOTIVATIONS MAP

Radar chart axes: Fun, Connections, Traditions, Bonding, Escape & Relax, Security, Familiarity, Simplicity, Expertise, Importance, Accomplishment, Novel & Authentic, Adventure. Scale: 0% to 60%.

- - - - UK Market Average ——— Simplicity Lovers

TRAVELLER RESPONSIBLE INDEX
75

How is this calculated?

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

TRAVELLER ECONOMIC INDEX
69

How is this calculated?

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

SIMPLICITY LOVERS
OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

o We are creatures of habit and seek familiar, temperate destinations.

o Prioritizing simplicity and serenity, we favor understated locales, and don't see the value of posting our travels online.

o Travel is a needed escape, we meander at our own pace, content to leave 'must-see' attractions unchecked.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
Quiet, relaxed experiences are how I take care of myself on vacation	91%	136
I'm not influenced by social media content when it comes to travel	90%	140
I don't see the point of posting about my trips on social media	89%	144
I don't consider diversity and inclusion factors when choosing travel destinations	75%	133
While travelling I generally stick to places that are direct and convenient to get to	69%	133
I generally don't participate in physical activities during my holidays	68%	129
I travel when I need to	67%	145
I appreciate diversity but not likely engage deeply with Indigenous cultures	67%	129
I seek out destinations that offer quiet opportunities for deep self-reflection	57%	132
I generally prefer to go back to the same destinations on holiday	57%	144
When travelling I often go to familiar restaurants, stores, and hotels that I recognize from home	53%	141
It's not important to me that I come back from travels having learnt something new	50%	129
Local cuisine is not a priority for me; I focus on other aspects of travel	46%	134

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To find much-needed time to relax	63%	132
To escape the demands of everyday life	57%	135
To feel safe and secure	55%	139
To enjoy simple, straightforward travel	35%	148
To be familiar with my surroundings	21%	134
To feel confident travel with no surprises	14%	128

DESIRED DESTINATION

	SCORE	INDEX
Relaxed	84%	139
Safe	76%	131
Peaceful	64%	149
Reliable	44%	134
Familiar	28%	140
Practical	24%	148

SIMPLICITY LOVERS
OUR DEMOGRAPHICS

OVERALL INSIGHT

o We are generally aged 55+, likely retired.
o Our monthly incomes are lower due to retirement, but our overall net worth is more comfortable.
o Find us in rural or suburban areas.

60%
76 Have a valid passport

GENDER

45% 90 Male

55% 111 Female

0% 83 Non-binary / Other

AGE

	SCORE	INDEX
18-34	7%	61
35-54	27%	87
55+	66%	132
MEAN YEARS	59.7	137

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	26%	122
>$40K to $120K	64%	78
More than $120K	6%	77
Refused	5%	119

HOUSEHOLD

9% 85 Children <18 Living At Home*

15% 130 Children 18+ Living At Home*

45% 132 Children NOT Living At Home*

45% 101 No Children

Option is not exclusive

EMPLOYMENT

	SCORE	INDEX
Employed FT	26%	57
Employed PT	11%	89
Self-employed	3%	83
Retired	48%	139

EDUCATION

	SCORE	INDEX
Primary education or less	0%	80
Secondary education	39%	135
Post-secondary education	61%	66

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX
South East	15%	115
East of England	12%	131
North West	12%	116
West Midlands	10%	102
Yorkshire and The Humber	9%	109
Greater London	9%	74

	SCORE	INDEX
Scotland	8%	106
East Midlands	7%	111
South West	6%	78
North East	6%	121
Wales	6%	127

SIMPLICITY LOVERS
OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

81

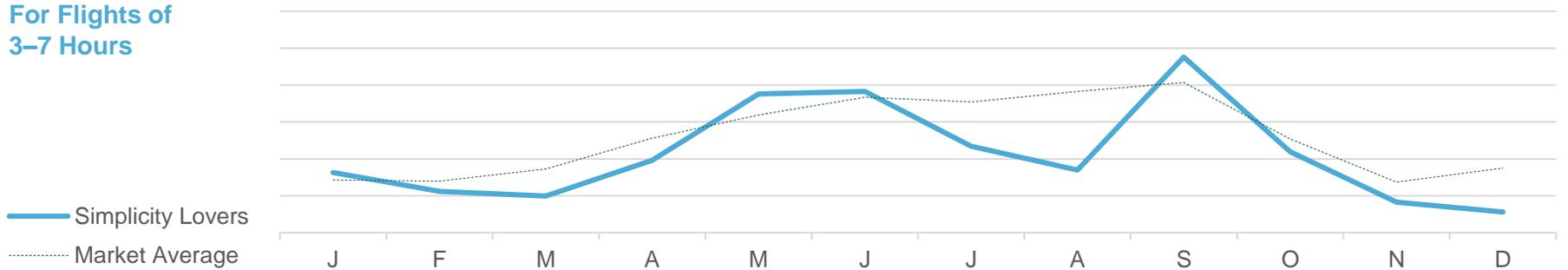TRAVEL TRADE INDEX: **GROUP**

68

KEY terminology on this page

o **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).

o **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
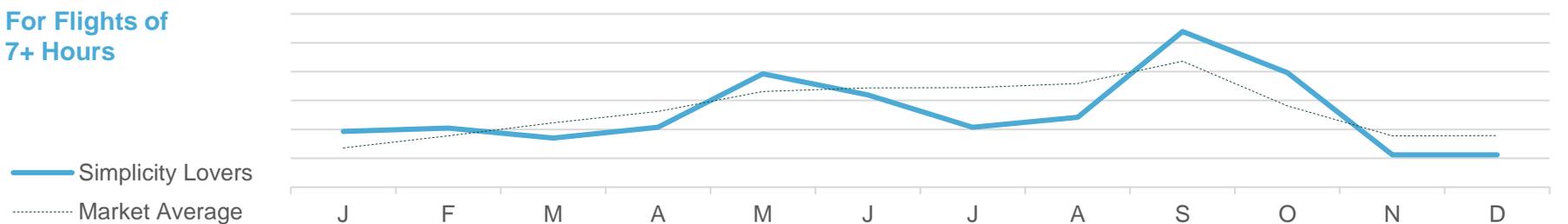
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours

— Simplicity Lovers
···· Market Average

J F M A M J J A S O N D

For Flights of 7+ Hours

— Simplicity Lovers
···· Market Average

J F M A M J J A S O N D

TRIP DURATION

		INDEX
1-2 Days	31%	74
3-5 Days	21%	90
1 Week Holiday	16%	89
2 Weeks Holiday	6%	78
3 Weeks Or More	2%	79

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	47%	138
International Leisure	16%	75
Business Trip	1%	67
Added Personal To Business	0%	78
Worked During Vacation	1%	74

Incidence is frequency of 2+ times per year

SIMPLICITY LOVERS
OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	48%	116
Vacation Rental (e.g., Airbnb, Vrbo)	24%	131
Premium Hotel	17%	79
Friend's or family's place	17%	113
Bed & Breakfast	13%	109
All-inclusive resort	13%	80

THOUGHTS ON INDIGENOUS TRAVEL

33%
71 INDEX SCORE

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

3%
72 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	65%	70
I really want to learn about the history of the destinations I visit	59%	81
I'm open to travelling to destinations with limited tourist infrastructure	37%	87
I like to explore places that are off the beaten path and less explored	37%	79
I'm willing to put in the effort while travelling in order to see lesser-known places	31%	67
I'm open to visiting destinations with challenging climates or weather conditions	15%	72

SIMPLICITY LOVERS
OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	**68%**	112
Adult relatives	**23%**	100
Friends	**12%**	101
Kids	**10%**	90
Solo	**10%**	90

BUDGET

AVERAGE SPEND (ALL TRIPS)

$2,180

63
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	**48%**	88
I consider the impact that I personally have on the destinations I visit	**37%**	84
It's important to me that I visit somewhere that is open to diversity and inclusion	**25%**	67
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	**21%**	82
Hearing from underrepresented communities is an important part of travelling	**15%**	70

25%
PRIORITIZE SUSTAINABLE TRAVEL

78   INDEX SCORE

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

o **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

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	48%	96
o Local restaurants	43%	100
o Cafes or bakeries	23%	90
o Street cuisine	13%	71
Nature experiences	42%	107
o Nature walks	28%	118
o Birdwatching	8%	111
Shopping	39%	105
o Outdoor markets	27%	113
o Souvenir shopping	17%	100
Health and wellness	16%	88
o Spas	10%	81
o Outdoor hot tub or bath	6%	76
Cultural experiences or attractions	49%	83
o Historical or archeological sites	34%	94
o Museums	32%	88
Family-focused attractions	25%	94
Guided tours	17%	79
Festivals and events	11%	71
Overnight experiences	10%	69
Casual sports	9%	87
Nightlife	5%	80
Water-based sports	4%	75

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	89%	135	81%	144
To escape from routine	65%	130	63%	147
To spend time with family	50%	105	49%	109
To have fun with friends	17%	90	16%	94
To check off dream travel places	10%	67	17%	75
For a romantic getaway	13%	94	8%	89
To learn through other cultures	16%	86	17%	81
For adventure and excitement	11%	61	16%	66
To seek solitude and isolation	7%	101	5%	96

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	55%	106	58%	119
Visiting friends / family	19%	87	30%	103
Family / friends wanted to go	22%	61	23%	82
Special event (e.g., wedding, reunion)	8%	67	10%	76
Festival or event	5%	71	3%	47
Kids wanted to go	7%	83	9%	90

11% 89 INDEX SCORE
Travel aligns with children's school schedule

13% 79 INDEX SCORE
Take time off for vacation during major holidays

8% 75 INDEX SCORE
Difficult to take more than a few days of vacation at once

SIMPLICITY LOVERS
OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

o We generally plan, but don't need to book many items, as we are often driving distance and don't book activities.
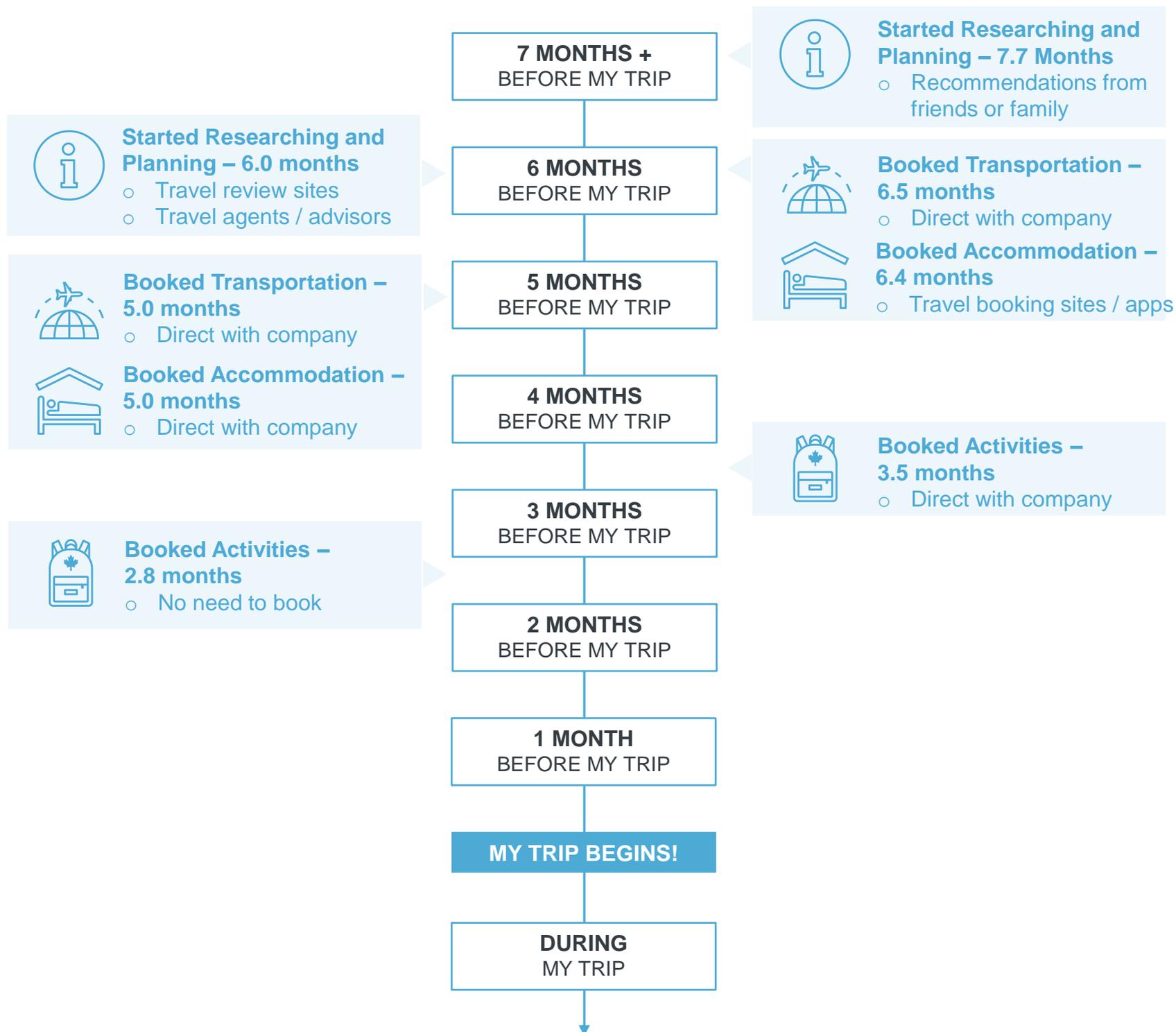
45%
Primary Trip Planner
62
INDEX SCORE

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

o **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

Started Researching and Planning – 6.0 months
o Travel review sites
o Travel agents / advisors

Booked Transportation – 5.0 months
o Direct with company

Booked Accommodation – 5.0 months
o Direct with company

Booked Activities – 2.8 months
o No need to book

FLIGHT OF 7+ HOURS

Started Researching and Planning – 7.7 Months
o Recommendations from friends or family

Booked Transportation – 6.5 months
o Direct with company

Booked Accommodation – 6.4 months
o Travel booking sites / apps

Booked Activities – 3.5 months
o Direct with company

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

SIMPLICITY LOVERS
OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

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

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

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

% OF TOTAL TRIPS — SEGMENT ALIGNMENT
23% 144 INDEX SCORE

TRIP TYPE	Countryside & Village		
COMPANIONS	Couple only		52%
	Extended family		28%
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Local restaurants		40%
	Nature walks		35%
	Souvenir shopping		19%
KEY BEHAVIOURS	Seeking peaceful quiet destination, no crowds, staying in a vacation rental		

% OF TOTAL TRIPS — SEGMENT ALIGNMENT
30% 165 INDEX SCORE

TRIP TYPE	Beach Resort		
COMPANIONS	Couple only		51%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Security
ACTIVITIES	Local restaurants		50%
	Cafes or bakeries		27%
	Souvenir shopping		24%
KEY BEHAVIOURS	Seeking mild climate to relax. Moderate budget, staying in a hotel or all-inclusive resort		

% OF TOTAL TRIPS — SEGMENT ALIGNMENT
16% 125 INDEX SCORE

TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		49%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Bonding	Novel & Authentic
ACTIVITIES	Outdoor markets		23%
	Nature walks		19%
	Visiting local monuments		16%
KEY BEHAVIOURS	Likely visiting friends, which drives the destination choice and activities		

% OF TOTAL TRIPS — SEGMENT ALIGNMENT
9% 107 INDEX SCORE

TRIP TYPE	Urban Centre		
COMPANIONS	Couple only		28%
	Extended family		25%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Adventure
ACTIVITIES	Museums		41%
	Bars and pubs		38%
	Cafes or bakeries		29%
KEY BEHAVIOURS	Trip with friends to explore a familiar city, dine out, and have fun		

SIMPLICITY LOVERS
OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

o We seek comfortable destinations that are easy to access, where we don't have to learn a new language.

o We take shorter trips, mostly domestic and within Europe a little closer to home.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	57%	142	Portugal	4%	106
Spain	15%	110	Italy	3%	75
Greece	7%	131	Norway	1%	110
France	4%	74	Germany	1%	65
USA	4%	67	Croatia	1%	79

WHERE DO WE WANT TO GO

SPAIN NORWAY CRUISE GREECE ITALY
YORK BENIDORM SCOTTISH ISLANDS IRELAND
CRETE AUSTRALIA ICELAND JAPAN NEW ZEALAND
NORTHERN LIGHTS SOMERSET SOUTH KOREA CAMBODIA WALES HAWAII MADEIRA
THAILAND UNITED STATES LONDON CANADA
EDINBURGH SLOVENIA ROME PORTUGAL LAS VEGAS CROATIA
CORNWALL PRAGUE FRANCE EGYPT CARIBBEAN
JERSEY
CALIFORNIA GERMANY THE ISLE OF MAN
BEACH DORSET CYPRUS ENGLAND SCOTLAND
DUBAI

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	67%	133
Is easy to travel to	66%	135
Isn't too crowded	64%	143
Is easy to travel around once there	63%	131
Doesn't take too long to get there	49%	145
Has a mild and pleasant climate	44%	141
Provides a sense of personal safety	42%	135
Language is not a barrier	37%	142

SIMPLICITY LOVERS
OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

o We likely haven't been to Canada before, and don't know too much about it as a travel destination.

o For those of us thinking about Canada, we'll be exploring Toronto, Vancouver, Calgary and Niagara Falls.
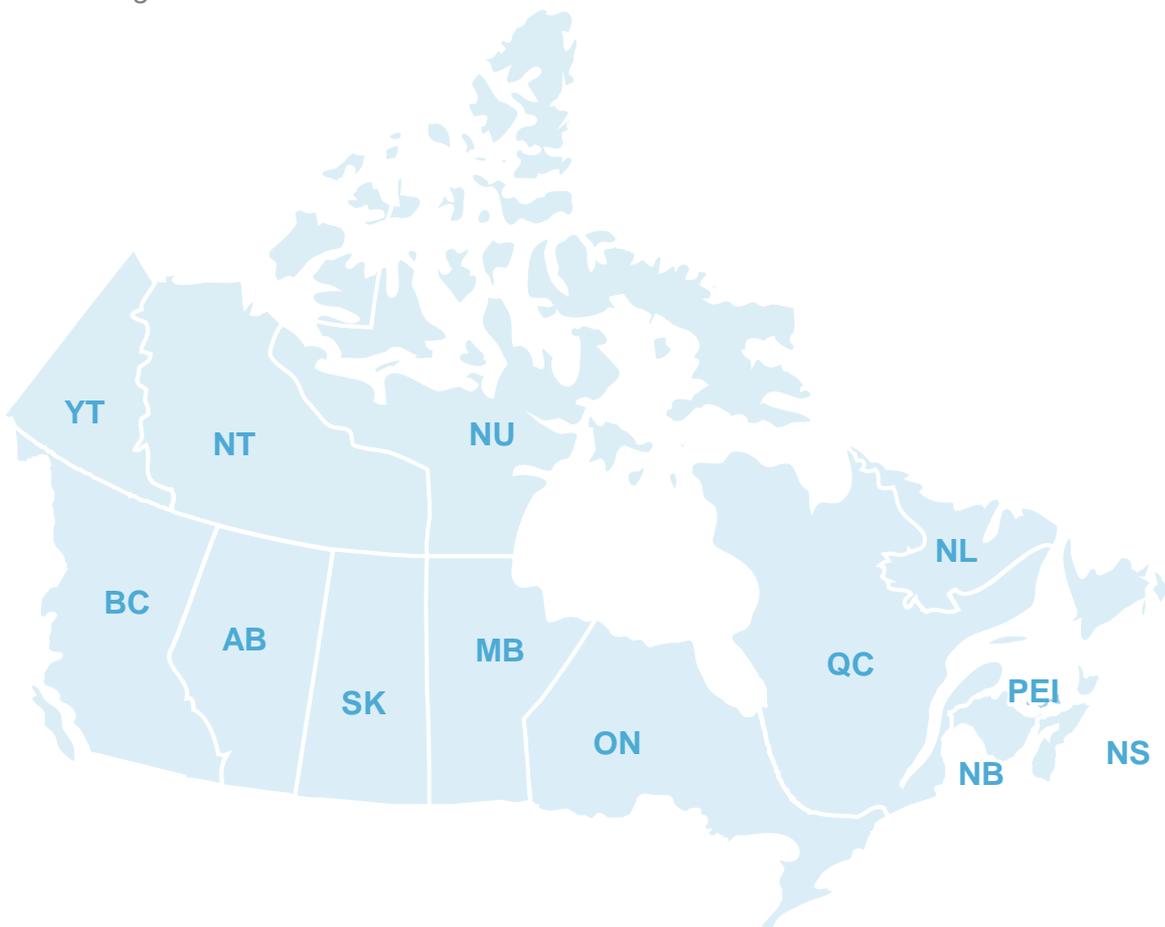
WHERE DO WE WANT TO GO IN CANADA

QUEBEC VANCOUVER
ONTARIO
ROCKIES TORONTO OTTAWA
BANFF
NOVA SCOTIA MONTREAL
CALGARY NIAGARA FALLS

PROVINCES WE HAVE VISITED BEFORE
Amongst Prior Canada Travellers

PROVINCES	%	INDEX
AB	19%	89
BC	34%	89
MB	0%	68
NB	1%	72
NL	3%	76
NS	3%	69
NT	0%	58
NU	3%	100
ON	49%	108
PEI	5%	93
QC	22%	68
SK	0%	68
YT	1%	76

SIMPLICITY LOVERS
OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

o If we have visited, it was many years ago.

o We gravitate to the spring and fall seasons to avoid crowds and take advantage of lower prices, though less pleasant climate can be a barrier.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	13%	24%	41%	38%
VS. TOTAL MARKET	17%	29%	46%	29%

4% Been to Canada in last 5 years
72 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS

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

INDEX
1% 82
2%
7% 68
18% 71
80
72% 132

FAMILIARITY WITH CANADA

- Been To Canada Multiple Times
- Been To Canada Once
- I know a lot about travel in Canada
- I have researched it, but only superficially
- I have heard it, but never looked into it
- I have never heard about travel in Canada

INDEX
7% 83
10% 82
1% 81
7% 68
50% 124
25% 122
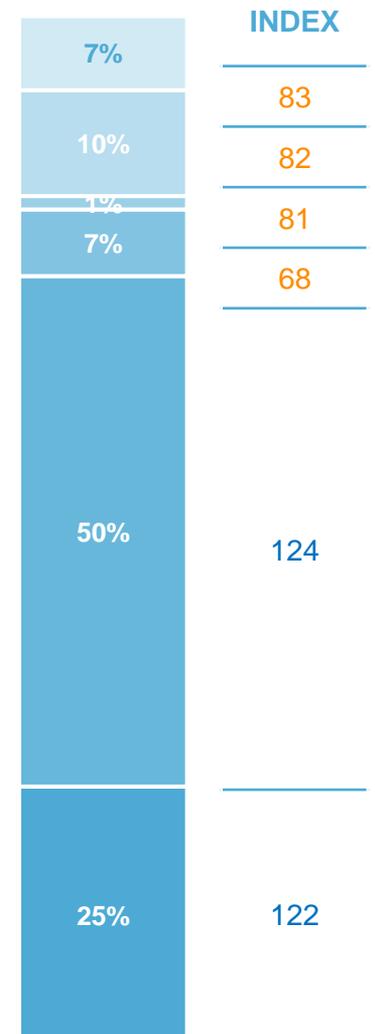
SIMPLICITY LOVERS
OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

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

MAJOR LIFE EVENTS IN LAST 5 YEARS

1%
Had a child
86 INDEX SCORE

11%
Started a new job / career
55 INDEX SCORE

6%
Bought a new home
73 INDEX SCORE

4%
Moved to a new city
70 INDEX SCORE

1%
Child started school
88 INDEX SCORE

31%
Purchased a car
82 INDEX SCORE

16%
Retired
129 INDEX SCORE

19%
Renovated house
78 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	**59%**	91
Savings and investments	**53%**	120
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	**46%**	123
Personal care and wellness	**34%**	121
Experiences (e.g., concerts, events).	**33%**	71
Home and decor	**32%**	125

SIMPLICITY LOVERS
FIND US ONLINE – MEDIA PROFILING

TOP PUBLICATIONS

	SCORE	INDEX
BBC News	49%	93
Sky News	21%	102
Daily Mail	20%	112
The Guardian	18%	71
ITV News	15%	110
The Telegraph	12%	112
Channel 4 News	9%	90
The Times	8%	67
Metro	5%	50
The Spectator	4%	136
The Mirror	4%	59
The Economist	3%	50
The Independent	3%	37
Financial Times	3%	38
Evening Standard	3%	50
National Geographic	2%	43
The New Statesman	1%	68
Conde Nast Traveller	0%	27
Time Out	0%	15
Wanderlust	-	-

TOP SOCIAL PLATFORMS

	SCORE	INDEX
Facebook	71%	105
YouTube	52%	85
Instagram	38%	72
Twitter (now X)	22%	69
TikTok	10%	43
Threads	8%	87

TOP TRAVEL PLATFORMS

	SCORE	INDEX
TripAdvisor	18%	70
Expedia	8%	65
Lonely Planet	2%	43
Rough Guide	1%	39
Adventure.com	0%	26
The Points Guy UK	-	-
Hand Luggage Only	-	-

FUN & SUN FAMILIES
PSYCHOGRAPHICS – SUMMARY

5%
2.5M
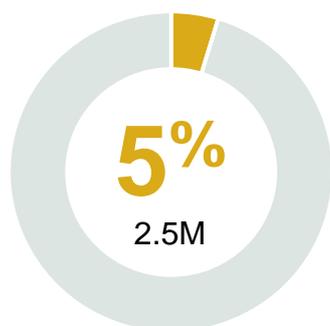
## % OF UNITED KINGDOM POPULATION

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. Occasionally we splurge on a major family trip, or take a simple couples trip to relax.

WHAT YOU NEED TO KNOW ABOUT ME

1 We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences, even if luxury is within reach.

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

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

4 While we mostly travel close to home on quick getaways, we are dreaming of a Disney or beach vacation.

EMOTIONAL TRAVEL MOTIVATIONS MAP

- - - - UK Market Average ——— Fun & Sun Families
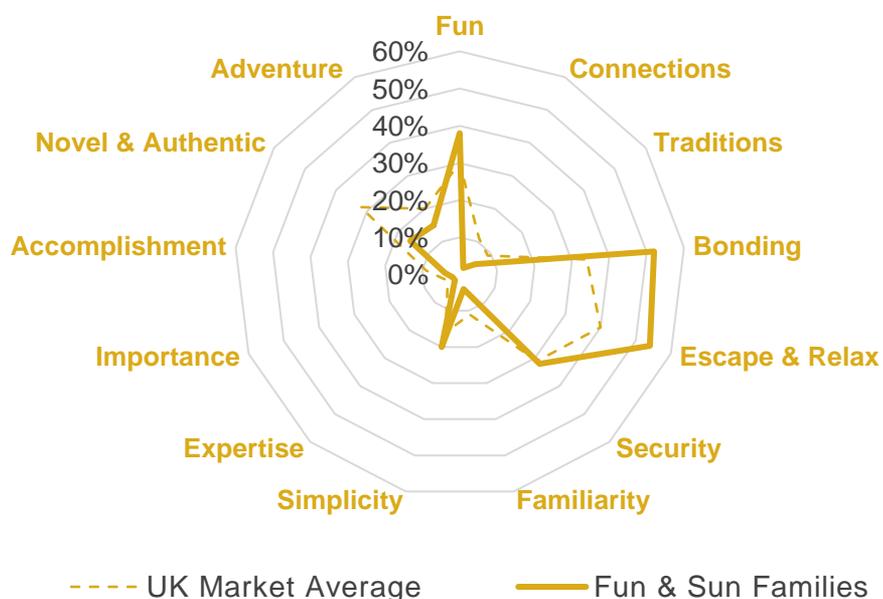
TRAVELLER RESPONSIBLE INDEX

72

How is this calculated?

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

TRAVELLER ECONOMIC INDEX

70

How is this calculated?

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

FUN & SUN FAMILIES
OUR PSYCHOGRAPHICS – TRAVEL VALUES

OVERALL INSIGHT

o We seek comfortable, entertaining destinations to escape everyday demands and enjoy quality time together.

o Prioritizing value, convenience, and relaxation, we choose popular, easily accessible hotspots.

o We focus on the present moment, creating lasting memories through shared experiences.

TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally only choose destinations with comfortable climate and weather conditions	84%	126
I generally avoid places that are challenging or difficult to reach	81%	135
I prefer destinations with well-established tourist infrastructure	73%	133
I tend to choose a destination to visit based off value for money	71%	144
I generally don't think much on the impact that I personally have on the destinations I visit	70%	129
I generally don't try to learn local languages	69%	133
While travelling I generally stick to places that are direct and convenient to get to	67%	130
I appreciate diversity but not likely engage deeply with Indigenous cultures	67%	130
I generally stick to the most popular areas when I visit somewhere	67%	126
It's not important to me that I come back from travels having learnt something new	56%	141
I'm more interested in the present and don't focus much on the history of where I visit	47%	132
Local cuisine is not a priority for me; I focus on other aspects of travel	46%	135
I generally prefer to go back to the same destinations on holiday	44%	121

EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To share quality time with others	69%	142
To just enjoy myself and have fun	69%	130
To find much-needed time to relax	62%	130
To escape the demands of everyday life	54%	128
To let loose and forget about day-to-day life	40%	140
To bond through shared experiences	35%	147

DESIRED DESTINATION

	SCORE	INDEX
Safe	73%	126
Friendly	70%	124
Relaxed	68%	114
Fun	59%	134
Reliable	43%	132
Familiar	23%	126

FUN & SUN FAMILIES
OUR DEMOGRAPHICS

OVERALL INSIGHT

o We likely have more than one child, spanning a range of ages.
o We are more likely to be female.
o We are primarily employed earning a modest income, and some of us are working as full-time parents.

AGE

	SCORE	INDEX
18-34	29%	104
35-54	61%	156
55+	10%	64
MEAN YEARS	41.4	73

HH INCOME (CAD)

	SCORE	INDEX
$40K or less	18%	86
>$40K to $120K	70%	131
More than $120K	7%	88
Refused	5%	131

EMPLOYMENT

	SCORE	INDEX
Employed FT	53%	117
Employed PT	24%	153
Self-employed	1%	55
Retired	5%	67

EDUCATION

	SCORE	INDEX
Primary education or less	0%	80
Secondary education	32%	116
Post-secondary education	68%	84

53% 60 Have a valid passport

GENDER

31% 50 Male

69% 150 Female

0% 83 Non-binary / Other

HOUSEHOLD

90% 146 Children <18 Living At Home*

8% 76 Children 18+ Living At Home*

6% 64 Children NOT Living At Home*

4% 56 No Children

Option is not exclusive

UNITED KINGDOM REGION BREAKOUT

	SCORE	INDEX		SCORE	INDEX
East of England	12%	131	West Midlands	9%	92
South East	12%	85	Greater London	8%	71
Yorkshire and The Humber	12%	142	Scotland	7%	78
East Midlands	12%	154	North East	4%	100
South West	11%	137	Wales	4%	50
North West	10%	85			

FUN & SUN FAMILIES
OUR BEHAVIOURS – TRAVEL HABITS

TRAVEL TRADE INDEX: **NON-GROUP**

102

TRAVEL TRADE INDEX: **GROUP**

79

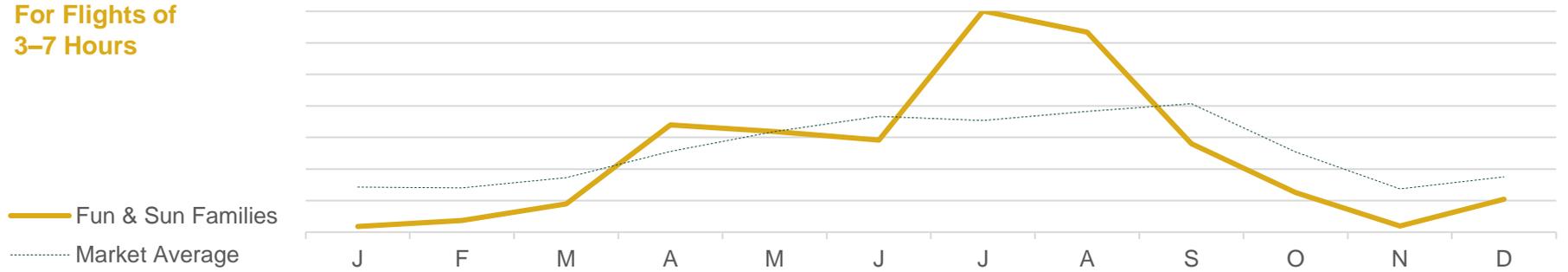**KEY** terminology on this page

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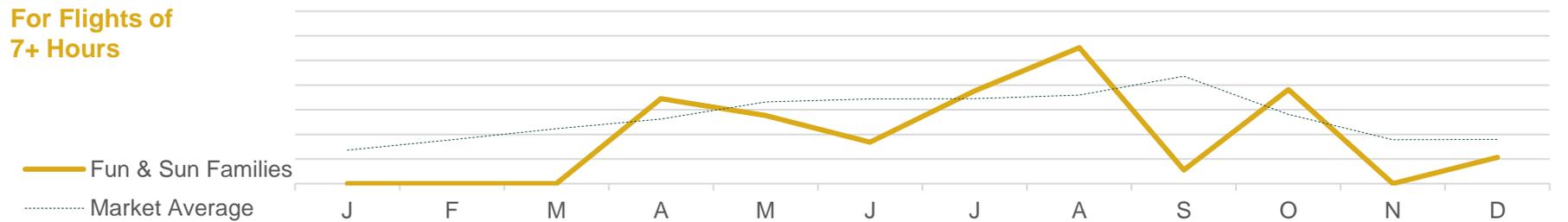
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TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours

— Fun & Sun Families
···· Market Average

J F M A M J J A S O N D

For Flights of 7+ Hours

— Fun & Sun Families
···· Market Average

J F M A M J J A S O N D

TRIP DURATION

		INDEX
1-2 Days	31%	73
3-5 Days	12%	47
1 Week Holiday	10%	52
2 Weeks Holiday	2%	60
3 Weeks Or More	1%	68

Incidence is frequency of 2+ times per year

TRIP TYPE

		INDEX
Domestic Leisure	44%	101
International Leisure	11%	64
Business Trip	6%	85
Added Personal To Business	1%	81
Worked During Vacation	0%	69

Incidence is frequency of 2+ times per year

FUN & SUN FAMILIES
OUR BEHAVIOURS – MORE TRAVEL HABITS

TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	41%	88
Campsite	26%	158
All-inclusive resort	25%	134
Vacation Rental (e.g., Airbnb, Vrbo)	22%	114
Premium Hotel	14%	71
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	14%	131

THOUGHTS ON INDIGENOUS TRAVEL

33%

70 INDEX SCORE

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

3%

72 INDEX SCORE

Strong Interest In Indigenous Activities

WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	67%	77
I really want to learn about the history of the destinations I visit	53%	68
I like to explore places that are off the beaten path and less explored	34%	74
I'm willing to put in the effort while travelling in order to see lesser-known places	33%	70
I'm open to travelling to destinations with limited tourist infrastructure	27%	67
I'm open to visiting destinations with challenging climates or weather conditions	16%	74

FUN & SUN FAMILIES
OUR BEHAVIOURS – TRAVEL STYLE

OVERALL INSIGHT

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

✈ TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	81%	137
Kids	80%	151
Adult relatives	27%	130
Friends	4%	67
Solo	2%	65

BUDGET

AVERAGE SPEND (ALL TRIPS)

$3,220

93
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	39%	58
It's important to me that I visit somewhere that is open to diversity and inclusion	37%	86
I consider the impact that I personally have on the destinations I visit	30%	71
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	20%	79
Hearing from underrepresented communities is an important part of travelling	18%	75

23%

PRIORITIZE SUSTAINABLE TRAVEL

74 INDEX SCORE

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

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

FUN & SUN FAMILIES
OUR BEHAVIOURS – TRAVEL ACTIVITIES

OVERALL INSIGHT

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

TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Family-focused attractions	86%	157
o Zoos or aquariums	64%	158
o Amusement parks or theme parks	63%	157
o Space or science centres	24%	152
Shopping	45%	118
o Outdoor markets	33%	129
o Souvenir shopping	33%	147
Cultural experiences or attractions	41%	63
o Visiting local monuments	26%	75
o Museums	25%	63
Nature experiences	31%	81
o Nature walks	21%	96
o Camping	10%	137
Local cuisine	28%	59
o Local restaurants	25%	63
o Cafes or bakeries	15%	65
Festivals and events	18%	87
Health and wellness	14%	69
Guided tours	13%	66
Nightlife	12%	95
Casual sports	11%	103
Water-based sports	8%	91
Overnight experiences	8%	64

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	91%	159	77%	153
To relax and unwind	69%	96	73%	120
To escape from routine	66%	133	61%	142
For adventure and excitement	22%	91	22%	79
To have fun with friends	5%	62	22%	109
To learn through other cultures	9%	66	0%	49
To check off dream travel places	20%	119	23%	96
To have memories from top travel spots	2%	65	0%	49
To learn about your own history or ancestry	0%	72	0%	64

EXTERNAL TRIP TRIGGERS

	SCORE	INDEX	SCORE	INDEX
Partner / spouse wanted to go	67%	129	78%	153
Kids wanted to go	71%	150	65%	146
Family / friends wanted to go	33%	100	45%	146
Visiting friends / family	13%	64	22%	76
Special event (e.g., wedding, reunion)	11%	77	11%	79
Festival or event	5%	72	17%	98

70% 149 INDEX SCORE
Travel aligns with children's school schedule

45% 141 INDEX SCORE
Take time off for vacation during major holidays

17% 128 INDEX SCORE
Difficult to take more than a few days of vacation at once

FUN & SUN FAMILIES
OUR BEHAVIOURS – HOW WE PLAN

OVERALL INSIGHT

o We plan our annual holiday well in advance - thinking about it at least 6 months in advance.

56%
Primary Trip Planner

88
INDEX SCORE

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

o **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 |
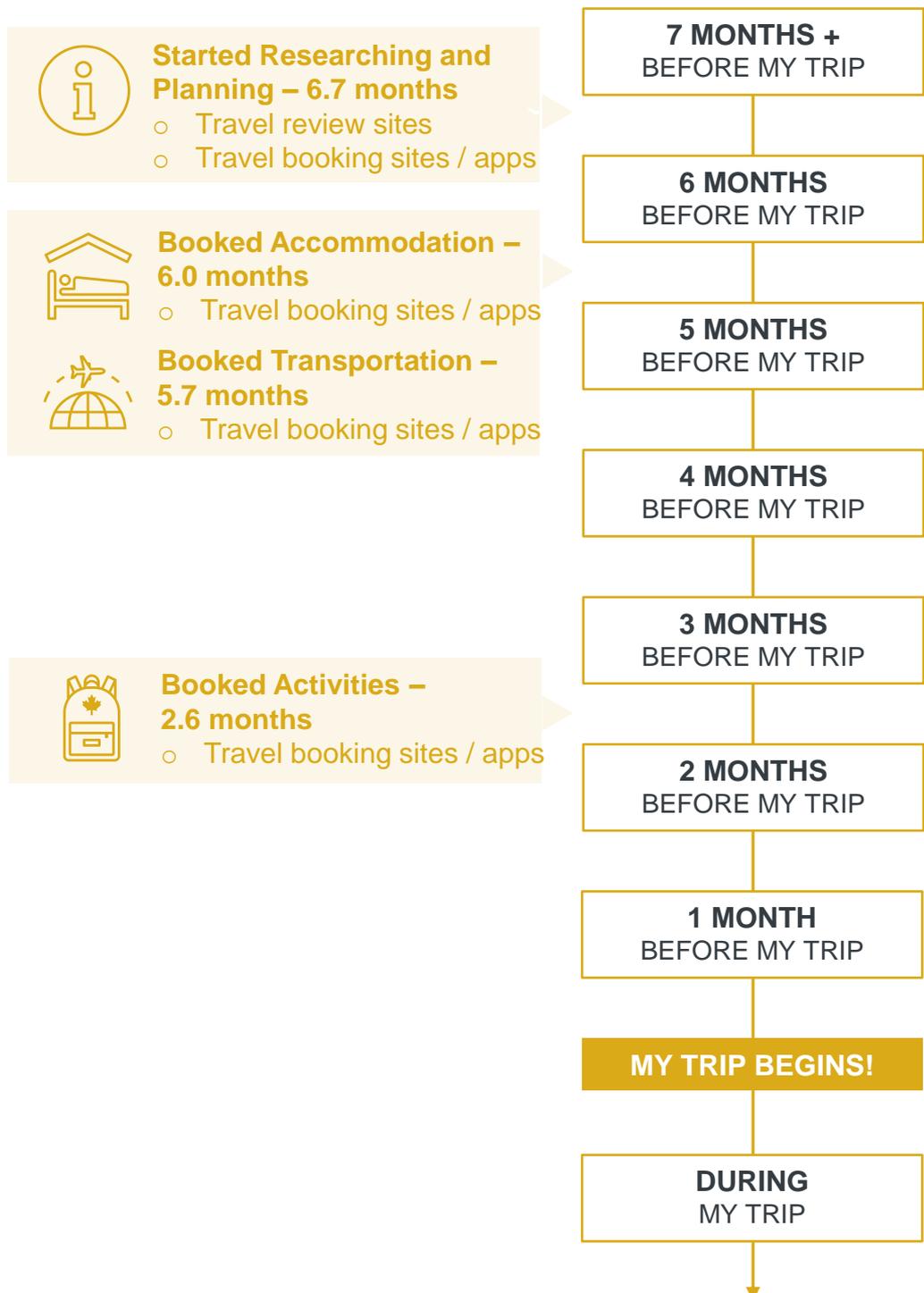
Started Researching and Planning – 6.7 months
o Travel review sites
o Travel booking sites / apps

7 MONTHS +
BEFORE MY TRIP

6 MONTHS
BEFORE MY TRIP

Booked Accommodation – 6.0 months
o Travel booking sites / apps

Booked Transportation – 5.7 months
o Travel booking sites / apps

5 MONTHS
BEFORE MY TRIP

4 MONTHS
BEFORE 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.

3 MONTHS
BEFORE MY TRIP

Booked Activities – 2.6 months
o Travel booking sites / apps

2 MONTHS
BEFORE MY TRIP

1 MONTH
BEFORE MY TRIP

MY TRIP BEGINS!

DURING
MY TRIP

FUN & SUN FAMILIES
OUR BEHAVIOURS – TRIP TYPES

OVERALL INSIGHT

o Our top trips feature beaches and destinations known for family attractions.
o We also take trips like Purpose Driven Families and Simplicity Lovers.

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

o **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
39% 178 INDEX SCORE

SEGMENT ALIGNMENT
● ● ● ● ●

TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids	**56%**	
	Extended family	**35%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Fun
ACTIVITIES	Souvenir shopping	**40%**	
	Amusement parks or theme parks	**30%**	
	Swimming	**15%**	
KEY BEHAVIOURS	Planned in advance, all-inclusive resort, often with extended family		

% OF TOTAL TRIPS
54% 145 INDEX SCORE

SEGMENT ALIGNMENT
● ● ● ● ●

TRIP TYPE	Family Trip		
DESTINATION TYPE	Countryside and village	**19%**	
	Small cities and town	**11%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Fun	Escape & Relax
ACTIVITIES	Zoos or aquariums	**28%**	
	Cafes or bakeries	**21%**	
	Visiting famous shopping centres	**18%**	
KEY BEHAVIOURS	All about kids, famous attractions, vacation rental or could be camping		

% OF TOTAL TRIPS
16% 123 INDEX SCORE

SEGMENT ALIGNMENT
● ● ● ○ ○

TRIP TYPE	Countryside & Village		
COMPANIONS	Couple only	**52%**	
TRIP EMOTIONAL MOTIVATIONS	Bonding	Escape & Relax	Simplicity
ACTIVITIES	Local restaurants	**40%**	
	Nature walks	**35%**	
	Visiting local monuments	**20%**	
KEY BEHAVIOURS	Couples trip to slow down and spend time outside. Staying in a vacation rental		

% OF TOTAL TRIPS
11% 109 INDEX SCORE

SEGMENT ALIGNMENT
● ● ○ ○ ○

TRIP TYPE	Urban Centre		
COMPANIONS	Nuclear family with kids	**64%**	
TRIP EMOTIONAL MOTIVATIONS	Fun	Bonding	Novel & Authentic
ACTIVITIES	Outdoor markets	**35%**	
	Street cuisine	**25%**	
	Museums	**21%**	
KEY BEHAVIOURS	Exploring a bucket list destination, seeking adventure, higher budget		

FUN & SUN FAMILIES
OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- o Our preferred destinations are kid-friendly, easy to access, and offer packages to make our lives easier.
- o Most of our travel stays close to home, In the UK or other more northern European countries.

WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
UK	50%	129	USA	3%	60
Spain	14%	102	Netherlands	2%	145
France	7%	120	Poland	2%	145
Greece	5%	69	Italy	2%	64
Portugal	3%	96	Belgium	1%	128

WHERE DO WE WANT TO GO

FLORIDA WHITBY CRUISE TENERIFE HAWAII MALAYSIA CANADA
MOSCOW MALDIVES AUSTRALIA KENYA SWITZERLAND
CARIBBEAN TURKEY VENICE DORSET SPAIN
AMSTERDAM NORWEGIAN FJORDS EGYPT LAPLAND
ITALY SEASIDE AMERICA ICELAND SKEGNESS WALES PARIS
JAPAN CUBA GREECE CORNWALL ISLE OF WIGHT
NEW YORK MAJORCA MEXICO THAILAND LAKE DISTRICT
BARBADOS BLACKPOOL CYPRUS MOROCCO DUBAI DISNEY
BEACH HOLIDAY IBIZA ORLANDO RHODES
MADRID

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	82%	144
Is not too expensive	59%	123
Is easy to travel to	55%	121
Is easy to travel around once there	47%	106
Good connectivity (Wi-Fi, cell service, etc.)	40%	139
Doesn't take too long to get there	30%	112
Has packaged holiday / vacation offers	30%	148
Offers all-inclusive resort packages	19%	119

FUN & SUN FAMILIES
OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

o If we have visited, it was many years ago.

o If we visit Canada, we would consider Toronto, Vancouver, and Niagara Falls.

WHERE DO WE WANT TO GO IN CANADA

WHISTLER

VANCOUVER

TORONTO

WATERFALLS

ALBERTA

MONTREAL

PROVINCES WE HAVE VISITED BEFORE
Amongst Prior Canada Travellers

PROVINCES	%	INDEX
AB	14%	63
BC	35%	93
MB	0%	68
NB	0%	65
NL	0%	57
NS	0%	59
NT	0%	58
NU	0%	74
ON	58%	150
PEI	0%	45
QC	21%	60
SK	0%	68
YT	0%	60

FUN & SUN FAMILIES
OUR BEHAVIOURS – MORE THOUGHTS ON CANADA

OVERALL INSIGHT

o We likely haven't been to Canada before, and don't know too much about it as a travel destination.

o We are unlikely to visit in the next few years.

CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	28%	30%	35%	21%
VS. TOTAL MARKET	17%	29%	46%	29%

4%
Been to Canada in last 5 years
70 INDEX SCORE

LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS
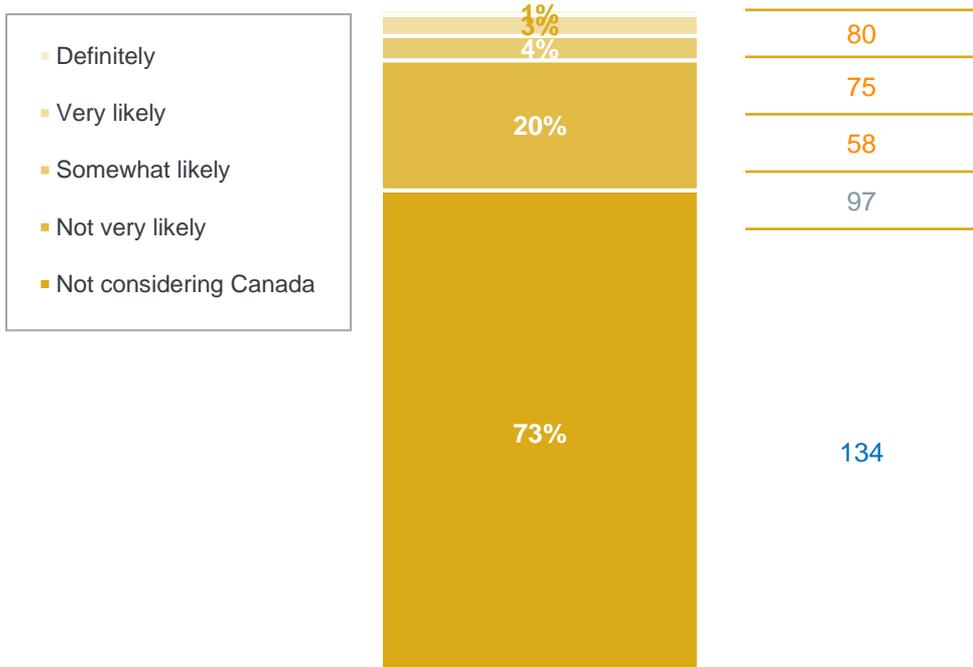
- Definitely
- Very likely
- Somewhat likely
- Not very likely
- Not considering Canada

	INDEX
1%	80
3%	75
4%	58
20%	97
73%	134

FAMILIARITY WITH CANADA

- Been To Canada Multiple Times
- Been To Canada Once
- I know a lot about travel in Canada
- I have researched it, but only superficially
- I have heard it, but never looked into it
- I have never heard about travel in Canada

	INDEX
5%	70
6%	54
2%	94
8%	83
47%	107
32%	143
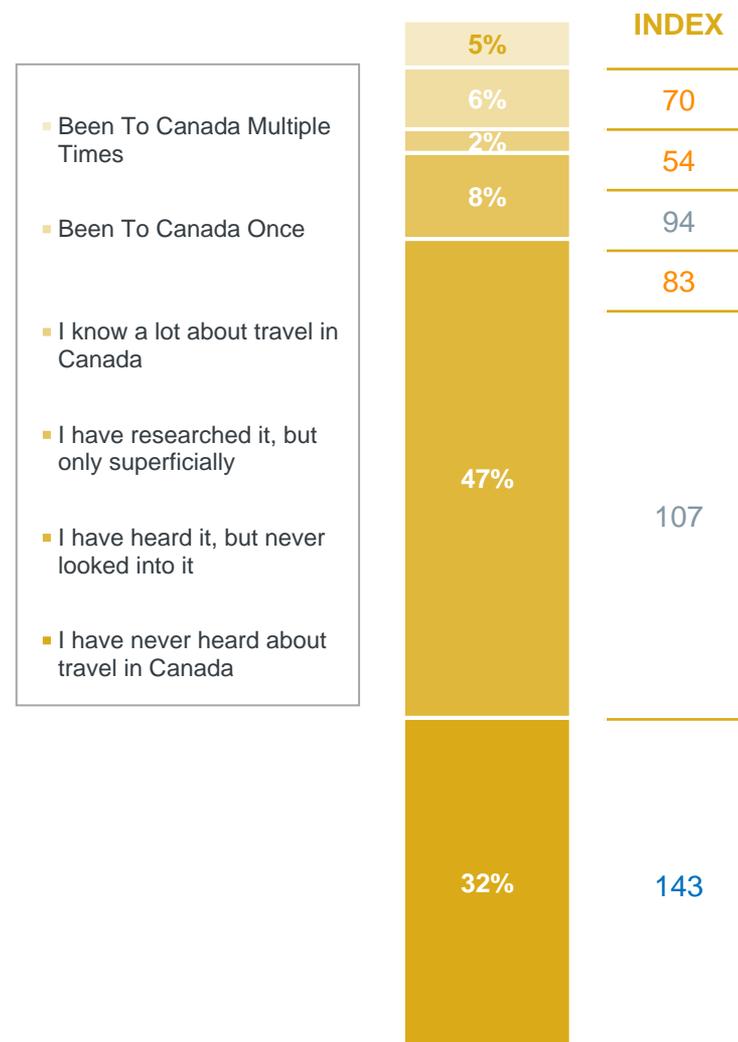
FUN & SUN FAMILIES
OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL

OVERALL INSIGHT

○ We are building our families, and the major events in our life revolve around that. This includes the big items, like a home, renovations, and career changes.

○ If we didn't just have a child, our young children are transitioning from daycare to school life.

MAJOR LIFE EVENTS IN LAST 5 YEARS

30%
Had a child
149 INDEX SCORE

31%
Started a new job / career
121 INDEX SCORE

11%
Bought a new home
100 INDEX SCORE

7%
Moved to a new city
84 INDEX SCORE

30%
Child started school
141 INDEX SCORE

35%
Purchased a car
96 INDEX SCORE

0%
Retired
57 INDEX SCORE

22%
Renovated house
101 INDEX SCORE

NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	51%	69
Experiences (e.g., concerts, events).	47%	120
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	41%	95
Home and decor	37%	143
Personal care and wellness	35%	134
Savings and investments	32%	45

FUN & SUN FAMILIES
FIND US ONLINE – MEDIA PROFILING

TOP PUBLICATIONS

	SCORE	INDEX
BBC News	53%	101
Daily Mail	22%	122
The Guardian	15%	60
Sky News	14%	68
ITV News	11%	82
The Telegraph	10%	89
Financial Times	7%	85
Metro	7%	69
The Independent	7%	81
The Times	6%	46
Channel 4 News	6%	55
The Economist	4%	66
The Mirror	4%	69
Evening Standard	3%	52
Time Out	3%	94
National Geographic	1%	34
Conde Nast Traveller	1%	84
Wanderlust	-	-
The Spectator	-	-
The New Statesman	-	-

TOP SOCIAL PLATFORMS

	SCORE	INDEX
Facebook	**74%**	109
YouTube	**63%**	101
Instagram	**62%**	117
Twitter (now X)	**26%**	84
TikTok	**22%**	96
Threads	**8%**	95

TOP TRAVEL PLATFORMS

	SCORE	INDEX
TripAdvisor	**24%**	91
Expedia	**8%**	71
The Points Guy UK	**6%**	172
Hand Luggage Only	**1%**	101
Adventure.com	**1%**	78
Rough Guide	-	-
Lonely Planet	-	-

SOURCE: GTRP 2024

This media profiling comes from usage of the long-form Segmentation Typing Tool in Destination Canada's 2024/2025 Global Traveller Research Program custom survey.

Date: December 2024

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.

	Outdoor Explorers	Culture Seekers	Refined Globetrotters	Purpose Driven Families	City Trippers	Simplicity Lovers	Fun & Sun Families
AUTHENTIC EXPERIENCER	23%	25%	24%	3%	6%	20%	1%
CULTURAL EXPLORER	20%	21%	20%	9%	10%	14%	5%
CULTURAL HISTORY BUFF	13%	23%	16%	1%	16%	26%	5%
FREE SPIRIT	14%	20%	27%	10%	15%	8%	6%
GENTLE EXPLORER	16%	17%	22%	7%	12%	20%	5%
NO HASSLE TRAVELLER	10%	9%	10%	4%	11%	44%	12%
REJUVENATOR	7%	9%	9%	3%	16%	45%	11%

GLOSSARY
DETAILS AND DEFINITIONS

DESIRED DESTINATION	How a traveller describes the personality of an ideal destination.
DESTINATION CANADA PRIORITY SEGMENT	Traveler segments prioritized by Destination Canada for targeted marketing and strategic efforts due to the opportunity they provide to contribute significantly to the Canadian tourism landscape. Aligning with these segments enables tourism partners to effectively coordinate with the national tourism strategy and maximizing their impact.
EMOTIONAL TRAVEL MOTIVATIONS	Key travel motivations derived from factor analysis, which condensed 25 initial statements into 13 primary motivations. These insights help industry researchers and marketers better understand travellers' emotional drivers, which may influence overall travel behaviours including the choice of destination, activities, and experiences during the journey

EMOTIONAL TRAVEL MOTIVATION: **ACCOMPLISHMENT**	This travel motivation is about achieving personal goals and overcoming challenges during travel. These travellers seek destinations and activities that promote self-discovery and personal growth, pushing their limits to feel a sense of accomplishment.	*Statement(s) included in the motivation:* • *To feel like I've accomplished something.* • *To push my limits and challenge myself.*
EMOTIONAL TRAVEL MOTIVATION: **ADVENTURE**	This travel motivation is about seeking thrill and excitement through adventurous activities. Travellers who seek adventure are often energized by a physical and emotional rush and they often proudly share their experiences with others.	*Statement(s) included in the motivation:* • *To have experiences I am proud to tell others about.* • *To feel a sense of adventure.*
EMOTIONAL TRAVEL MOTIVATION: **BONDING**	This travel motivation focuses on spending quality time with travel companions, particularly partners and family members. Travellers motivated by bonding cherish creating lasting memories through shared experiences with their loved ones.	*Statement(s) included in the motivation:* • *To share quality time with others.* • *To bond and create lasting memories through shared experiences.*
EMOTIONAL TRAVEL MOTIVATION: **CONNECTIONS**	This travel motivation is about building relationships and forming connections with new and interesting people. Travellers motivated by connections look for opportunities to engage with locals or other visitors on their travels.	*Statement(s) included in the motivation:* • *To feel connected with new people.*
EMOTIONAL TRAVEL MOTIVATION: **ESCAPE & RELAX**	This travel motivation signifies a desire to escape daily routines and simply relax during vacation. Travellers motivated by escape and relax often seek solitude, tranquility, and rejuvenation in peaceful destinations.	*Statement(s) included in the motivation:* • *To escape the demands of everyday life.* • *To find much-needed time to relax.* • *To let loose and forget about day-to-day life.*

DESTINATION CANADA

GLOSSARY

DETAILS AND DEFINITIONS

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

GLOSSARY
DETAILS AND DEFINITIONS

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

GLOSSARY
DETAILS AND DEFINITIONS

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