

TRAVELLER SEGMENTATION PROGRAM

HOW-TO-GUIDE



CANADA 



CANADIAN TOURISM DATA
collective



**DESTINATION
CANADA**



LAND ACKNOWLEDGEMENT

We acknowledge the Indigenous Peoples of all the lands that we work and live on. We do this to reaffirm our commitment and responsibility in improving relationships between nations and our own understanding of local Indigenous Peoples and their cultures. From coast to coast to coast, we acknowledge the territory of the Inuit, Métis and First Nations people who have called this place home for generations beyond measure.

INDUSTRY ACKNOWLEDGEMENT

We would like to thank the many industry partners who helped create the educational resources for this program including IPSOS who conducted the research and the Tourism Café Canada who created the educational resources. Plus a national segmentation advisory committee, comprised of over 30 representatives from across the country with diverse perspectives on marketing, product and experience development, research and destination development, who contributed valuable input and feedback throughout the program's development.

Disclaimer

The information, data and ideas provided herein are presented in good faith. This program is not designed to render legal advice; and some opportunities or information may become outdated or not exactly as described at the time of reception. Individuals using these materials are urged to appreciate these factors and, ultimately, to interpret the information accordingly. The information reflects the best information that is available to the authors at the time of publication. The content of this document is subject to external changes in the marketplace, consumer interests, and individual business requirements.

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1 GET READY: AN OVERVIEW

Destination Canada is committed to supporting the long-term success of all private sector businesses, not-for-profit organizations and government entities that contribute to the visitor economy and strengthen the appeal of their destinations. Providing leading-edge research on Canada's ideal guests, Destination Canada has set the stage for the tourism industry to unite and simplify tourism's complex ecosystem through a common language and knowledge foundation that informs strategic and tactical decisions.

The Traveller Segmentation Program¹ is a comprehensive suite of industry resources that will complement existing organizational research and connect individuals responsible for marketing, product and experience development, partnerships and destination development within a business or destination.

This How-to-Guide is an important resource for those in the tourism industry seeking to understand and use the Traveller Segmentation Program. The guide will support your ability to use the various program resources to inform marketing, media planning, creative development, product and experience development, partnerships and collaborations.

This research is designed for the tourism sector, including individual businesses, Destination Canada partners, destination marketing and management organizations and other entities that support and drive tourism. It provides a framework of seven traveller segments in Canada and Destination Canada's nine international markets, around which the industry can align. The new research insights will enable everyone to contribute to the appeal of their local, regional, and provincial areas to global markets. The program also sets the stage for leveraging investments to grow travel to and within Canada.



¹ The terms 'the segmentation program' and 'the program' have been used interchangeably throughout this document when referring to the Traveller Segmentation Program.

About This Guide

The guide provides information about:

- Accessing the program resources, specifically the traveller profiles and the traveller and destination quizzes.
- The research methodology.
- The type of information included in the profiles and how it can be used.
- How to use the traveller and destination quizzes to identify your ideal guest.
- How to apply the information in the profiles to marketing and product development.
- Definitions of terminology used, including a glossary of terms (Appendix 1).

1.1 Canada's Traveller Segmentation Program

The Traveller Segmentation Program will help unlock Canada's tourism development, investment, and marketing potential through research that offers rich insights into domestic and international travellers' diverse preferences, motivations and behaviours. The program uses data-driven insights to group travellers into distinct groups, allowing tourism operators, marketers and destination managers to tailor their offerings to specific visitor types.

The program offers a deeper understanding of psychographics – the attitudes, interests and values that drive travellers' decisions. It will enable marketers to increase the effectiveness and Return on Investment (ROI) of their marketing and provide input to support the development of new and enhanced products and experiences.

1.1.1 Strategic National Alignment

The Traveller Segmentation Program fully supports Destination Canada's Tourism 2030: A World of Opportunity strategy². The research informs actioning the five guiding principles designed to increase the wealth and well-being that tourism provides to Canadian communities.



Collaboration

Tourism stakeholders inspire innovation and foster alignment within the tourism sector and the larger economy.



Prosperity

Tourism businesses in Canada grow stronger, are more profitable and more resilient, and tourism's contribution to the economy grows.



Public Support

Tourism benefits all of Canada, making Canadians welcoming hosts and supporters of the industry.



Regeneration

Tourism is a force for driving the economic, socio-cultural, and environmental vitality of our places, businesses and communities, benefitting all Canadians.



Reconciliation

By connecting people, tourism helps Canadians to better know and understand one another, breaking down barriers and building unity.

1.2 Canada's National Research History

The information available to guide strategic to tactical decision-making in tourism has evolved. Initially, the research supporting marketing focused primarily on demographic characteristics (income, education, gender, friends and couples vs. families) and location. For over 20 years, Destination Canada has continuously evolved its research, incorporating new insights, advanced tools and emerging technologies to stay ahead of shifting traveller trends and behaviours.

² <https://www.destinationcanada.com/en/programs/destination-canada-2030-tourism-strategy>

1.2.1 The Evolution

Figure 1: Evolution of Canada's National Research

In 2000, Statistics Canada released the Travel Activities and Motivations Survey (TAMS). Updated in 2006, the research incorporated an expanded list of variables.

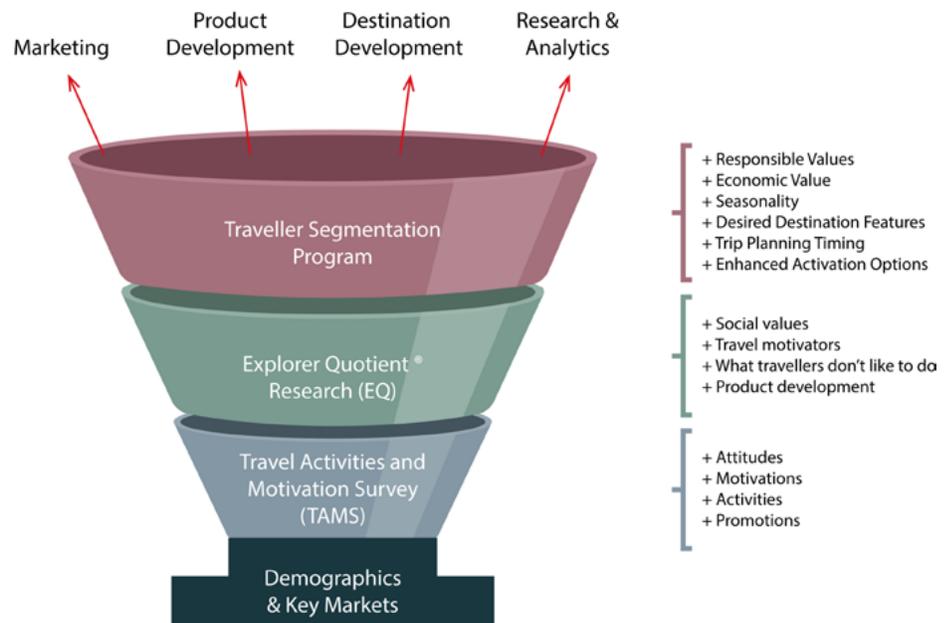
In 2005, the Canadian Tourism Commission (now Destination Canada), working with Environics Research, released the Explorer Quotient (EQ) values-based segmentation framework that expanded on the TAMS by gathering information on travel and social values. This greatly improved the value of the research to inform marketing and product/experience development. Initially, EQ addressed

Canada, the UK and the US; it was updated in 2010/11 to include the original three markets plus Destination Canada's other core international markets. The program was further enhanced when linked with Environics Analytics' PRIZM segmentation framework for the US and Canada. The link to PRIZM allowed for targeting segments via zipcode and postal code, while providing a more robust picture of the segments regarding media and product usage preferences.

The Traveller Segmentation Program is the most powerful national research currently available to the tourism industry in Canada in that it:

- Introduces new variables such as seasonal preferences, an understanding of travel companions and their impact on travel plans and behaviours, an understanding of travellers' values regarding responsible travel³, and the desired destination attributes and personality of the destination travellers are seeking.
- Provides a highly detailed profile of seven traveller segments for Canada and Destination Canada's nine international markets.
- Is designed to be more actionable and predict the economic and responsible travel values that best support Canadian communities.
- Includes a traveller quiz and a new destination quiz to identify priority segments.

For paid partners of the Canadian Tourism Data Collective, it includes insights to inform activation decisions, including media profiling and segment recipes on major platforms such as Google and Meta being released in 2025.



The Tourism Segmentation Program resources provide a new way of understanding our travellers and destinations.

³ Responsible travel values are addressed and defined more fully in section 2.2.1

1.3 Program Benefits

The Traveller Segmentation Program research offers tourism destinations and businesses a deep understanding of travellers from Canada, Australia, China, France, Germany, Japan, Mexico, South Korea, the UK and the US. It equips users with the information needed to identify, attract and develop tourism experiences aligned with the values and interests of Canada's ideal guests.

Furthermore, the research offers a common understanding and language for destinations and operators to understand the traveller segments. This provides opportunities to strengthen collaboration, leverage investments and foster greater marketing, product development and research efficiencies.



Other benefits include the ability to:

- Better understand each segment's spending potential when deciding which segment(s) to target, based on comprehensive estimates of each traveller type's economic value.
- Identify which segments are visiting/interested in visiting with a user-friendly traveller quiz.
- Identify how well each traveller type aligns to a destination, given its attributes with an easy-to-use destination quiz.
- Improve target audience communication based on an in-depth understanding of a traveller's motivations, trip context, and triggers.
- Focus on, and align with, responsible tourism practices based on new insights regarding sustainable and responsible travel.
- Improve targeting with media profiling and activation tools, which are available to paying partners of the Canadian Tourism Data Collective.
- Extend base program access to local tourism partners through the Canadian Tourism Data Collective platform.

2 GETTING STARTED

2.1 Introducing The Research

2.1.1 Methodology

IPSOS, a global research firm, conducted the research. Online surveys were presented in the official language(s) of the countries surveyed in Destination Canada's core markets. The research focused on travellers. To qualify, respondents needed to meet the following criteria to be defined as a traveller:

- Age 18+,
- Had travelled for leisure purposes, domestically or internationally, in the past five years with a minimum of one night in paid accommodations, and/or
- Is very/definitely likely to take a domestic or international leisure trip, for a minimum of one week in the next two years, where they will pay for accommodations.

Those who did not meet the required definition of a traveller were classified as non-travellers and excluded from the research. The research covered domestic and international travel.

For Canadian respondents, the survey differentiated between travel within their home province and other parts of Canada, which helped determine which trips were analysed and shaped questions about future Canadian travel. Those who only travelled within their home province were still included in the research.

2.1.2 Sample Sizes, Quotas and Weighting

Sample sizes varied by market:

- Approximately 2000 leisure travellers were collected in each of the following markets: Canada, Australia, France, Germany, Japan, Mexico, South Korea and the UK.
- Approximately 3000 leisure travellers were collected in China and the US.

Quotas were set to ensure age and gender representation among the regions of each country.

Data from each market were weighted by region, age and gender to align with the approximate distributions from national census distributions. For China and Mexico, sampling was restricted to the cities or socio-economic groups prioritized by Destination Canada and its partners.

2.1.3 Segment Creation

The research takes a holistic approach to segmenting potential travellers. It provides the insights and tools to identify and connect with the right people, at the right time, with the right message.

- **Right People:** Finds the right people by focusing on psychographics – the intrinsic factors motivating people to travel. The program captures how people's values and attitudes have evolved and changed in recent years.
- **Right Time:** Beyond values, this program considers how travel choices differ for different types of trips. The research identifies how external and situational influences cause people to align with, or diverge from, their overarching travel values. It helps Canadian destinations have a more comprehensive understanding of what drives traveller choices for their specific destination.
- **Right Message:** The suite of program resources are designed for activation. Segment profiles provide insights to inform messaging, product and experience development, marketing strategy and targeted advertising.

The seven traveller segments exist in each geographic market. However, the share each segment represents varies by geographic market. Additionally, nuances differentiate the same traveller type from one country to another. For this reason, it is essential to first select the country, then the traveller type, then read the detailed profile.

Figure 2: Country → Traveller Type → Profile



2.1.4 Analysis

The research analyzed the core travel values, attitudes and emotional motivations of travellers to provide a better understanding of the types of destinations travellers are looking for in terms of the destination’s vibe and the specific experiences offered. It identifies the influence of family members and friends on travel decisions regarding where to go, when to travel and the kinds of preferred activities. Section 2.5 further describes the data elements included in the traveller segments and profiles.

2.2 Feature Highlights

2.2.1 Shifting to Highly Engaged Guests

Historically, Destination Canada prioritized its marketing focus on High Value Guests, generally defined in terms of income and travel frequency. The segmentation research provides more in-depth information on travellers’ psychographics and their economic behaviours and responsible travel values.

Two new metrics were developed that align with Destination Canada’s principles of prosperity, reconciliation and regeneration, which the traveller segments were designed to predict.

Economic Value Index⁴ is an industry metric that provides insight into a traveller type’s propensity to positively impact Canada’s visitor economy.

ECONOMIC VALUE COMPONENTS							
Canada Travel Frequency	Canada Travel Recency	Travel Spend	Canada Travel Likelihood	Income / Net Worth	International Travel Frequency	Luxury Preferences	Household Travel Decision Impact

→ **Canada Travel Frequency**

The higher the frequency of past travel to Canada, the higher/lower the input value.

→ **Canada Travel Recency**

The more recent the travel to Canada, the higher/lower the input value.

4 An Index provides a comparison of the score for the traveller type against the score for the market as a whole (all traveller types)

→ **Travel Spend**

The higher the total average trip spend, the higher the input value.

→ **Canada Travel Likelihood⁵**

The stronger the likelihood to travel to Canada in the next 2 years, the higher the input value.

→ **Income/Net Worth**

The higher the household income and net worth, the higher the input value.

→ **International Travel Frequency⁶**

The higher the frequency of international travel, the higher the input value.

→ **Luxury Preferences**

The stronger the preference for luxury travel, the higher the input value.

→ **Household Travel Decision Impact**

The greater the input to travel decision-making, the higher the input value.

Responsible Values Index is an industry metric that provides insight into each traveller type's alignment with Canada's responsible travel values. These values are assessed based on agreement with a variety of statements. The higher the agreement, the higher the input value.

RESPONSIBLE VALUE COMPONENTS				
Socio-Cultural Sustainability	Environmental Sustainability	Economic Sustainability	Reconciliation	Inclusive Values

→ **Socio-Cultural Sustainability**

Overall levels of consideration are given to their personal impact on the destinations visited.

→ **Environmental Sustainability**

Overall levels of consideration on their personal commitment to sustainable travel and actively taking steps to minimize their impact on the environment when travelling.

→ **Economic Sustainability**

Overall levels of consideration on knowing the money they spend will support the economy of the places they visit.

→ **Reconciliation**

Overall levels of consideration on their need to look for opportunities to hear stories from and engage with the Indigenous people/original inhabitants of the places they visit.

→ **Inclusive Values**

Overall levels of consideration on:

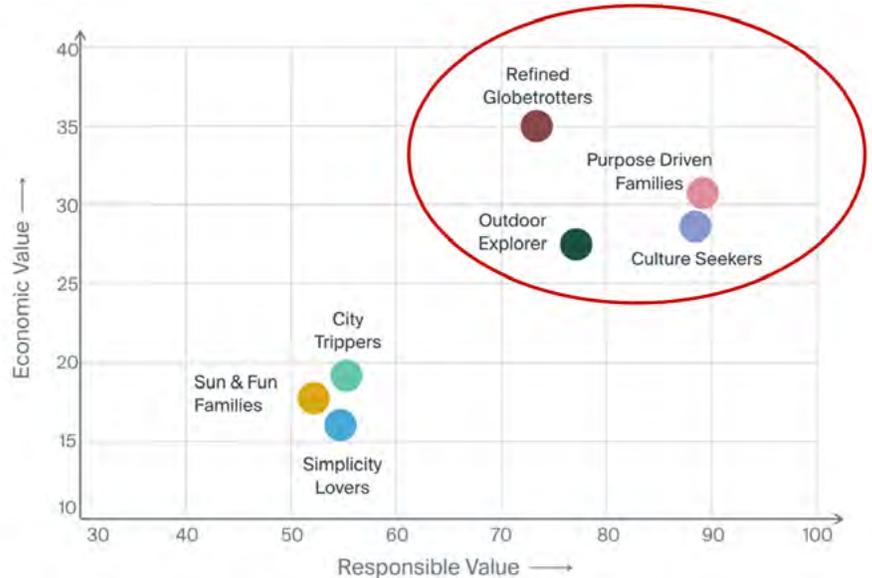
- The importance of hearing from underrepresented communities when travelling.
- The importance of visiting somewhere open to diversity (e.g., cultural, ethnic, gender, sexual orientations, etc.).

5 For Canadian segments, the definition is slightly different and is based on the likelihood of travelling outside the province of residence in the next two years.

6 For Canadian segments, the measure is based on the frequency of domestic travel. The higher the frequency of domestic travel, the higher the input value.

Figure 3: Destination Canada's Highly Engaged Guests and Priority Segments

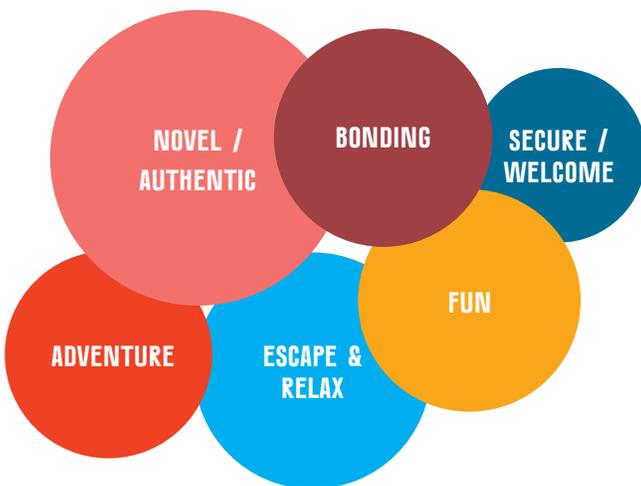
When viewed together and plotted on a graph (Figure 3), Refined Globetrotters, Outdoor Explorers, Purpose Driven Families and Culture Seekers perform highly on both metrics. As a result, Destination Canada has identified these four traveller types as priority segments for their international markets and refers to them as Highly Engaged Guests rather than High Value Guests. Although City Trippers, Simplicity Lovers and Fun & Sun Families do not have as high responsible travel and economic values indexes, they may still be important segments for local visitor economies in Canada.



A review of the core travel motivations associated with Highly Engaged Guests compared with the other traveller segments (Figure 4), shows that Highly Engaged Guests are more likely to be motivated by adventure and novel/authentic experiences. In contrast, the other segments are more likely to be motivated by fun and to escape/relax.

Figure 4: Highly Engaged Guests Motivations

HIGHLY ENGAGED GUESTS
CORE TRAVEL MOTIVATIONS



OTHER TRAVEL SEGMENTS
CORE TRAVEL MOTIVATIONS

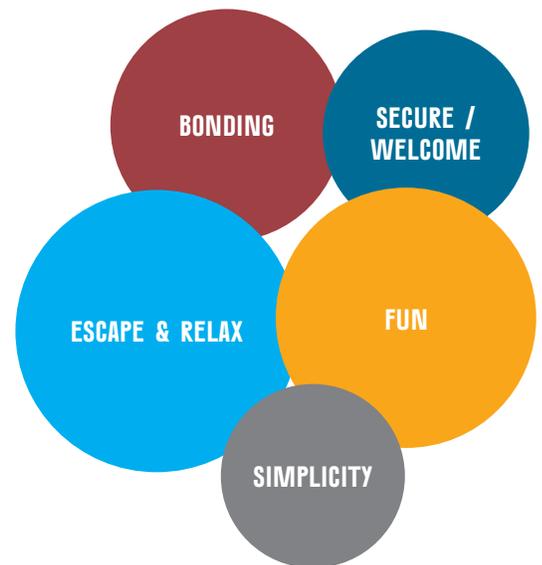
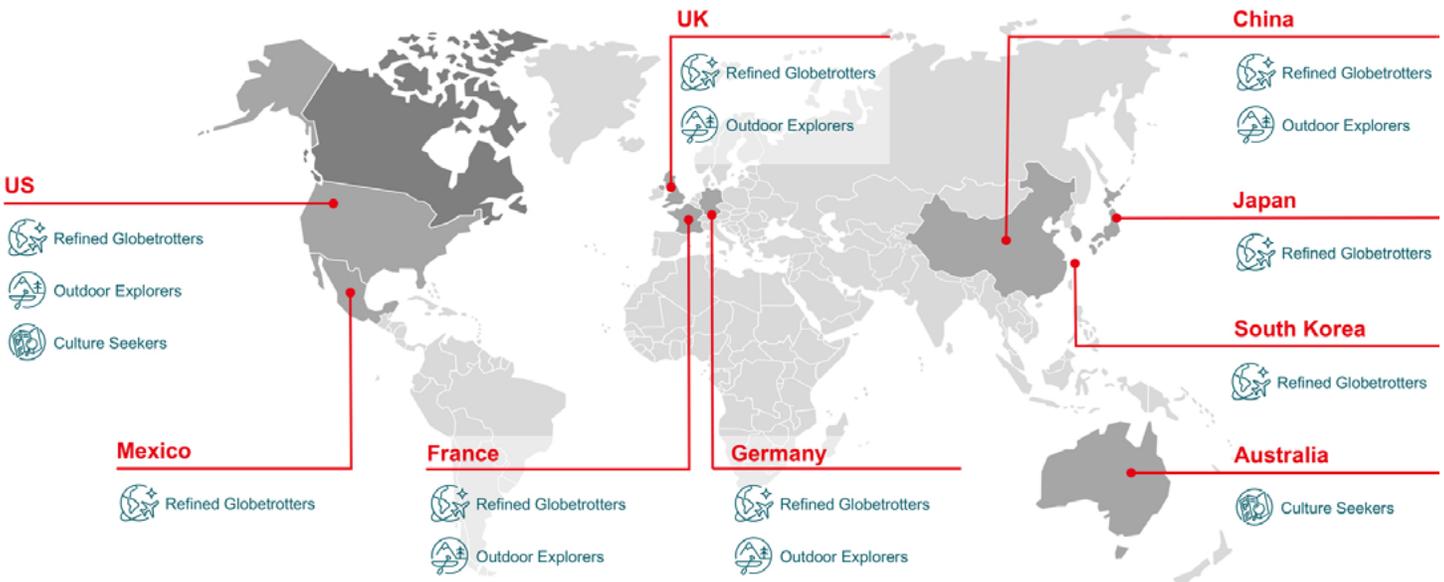


Figure 5 presents which of the Highly Engaged Guest segments are Destination Canada's priority segments for each of their international markets

Figure 5: Destination Canada's Priority Segments

DESTINATION CANADA SEGMENT PRIORITIZATION



Aligning with Destination Canada and their priority segments in international markets will allow for the leveraging of each other's collective impact which can have significant marketing benefits for destinations and businesses.

2.2.2 Future Features

Destination Canada plans to introduce additional research elements for paid partners of the Canada Tourism Data Collective:

1. Segment targeting parameters for Google and Meta, key platforms most used by tourism organizations and their agencies, to set up and manage online advertising campaigns. When you „activate“ an ad campaign, you are turning on elements that ensure your ads are visible to the people most likely to engage with them, helping maximize your return on investment.
 - For Google, this includes setting up keywords, targeting options (such as demographics, affinities or location) and choosing where your ads will appear (such as on Google Display or YouTube).
 - For Meta (Facebook/Instagram), activation involves setting your target audience, choosing ad placements across Facebook, Instagram, Messenger and optimizing your ads based on objectives such as awareness, engagement, or conversions.
2. A link to PRIZM in the US and Canada will provide valuable media planning inputs and allow for geo-demographic targeting where lists of postal codes and zip codes by segment can be uploaded to key marketing platforms for targeting.

Additionally, Destination Canada is developing an AI-driven persona bot for key traveller types. This digital assistant will draw on the program data when interacting with users and provide customized, traveller-specific responses to any question posed. The ability to pose highly focused questions will help tourism destinations quickly and easily understand the segment at a much deeper level.

2.3 An Overview of the Program Resources

Destination Canada provides three industry resources:



Target selection tools include a traveller quiz and destination quiz to aid in identifying your existing guests and those that align with your destination's attributes.



Traveller profiles contain detailed information on seven traveller segments in 10 core markets, 70 profiles in total. Each profile is packed with in-depth information about the traveller type to inform marketing strategies and tactics, destination development and product and experience development.



Training resources include:

- A 25-minute introductory, interactive online course.
- This How-to-Guide.
- Materials to host a half-day workshop, online or in-person, including a PowerPoint deck with speaking notes and a facilitator's guide (available at the Canadian Tourism Data Collective partner level).

2.4 Target Selection Tools

2.4.1 The Traveller Quiz



Traveller Quiz

The Traveller Quiz is a fun, interactive research tool that identifies respondents with one of the seven segments based on their responses to the quiz. Businesses and destinations can use the quiz with visitors to determine which segments are visiting the area and with internal audiences to understand the perspective people bring to discussions on marketing, product and experience development.

Section 3.1 provides more detail and thoughts on how to use the Traveller Quiz.

2.4.2 The Destination Quiz



Destination Quiz

This dynamic and interactive tool is designed to help destinations and businesses identify the traveller segments most likely to be drawn to their unique tourism assets, activities and overall personality. By combining this insight with an understanding of the travellers types already visiting the area, destinations and businesses can more effectively target their ideal guests with new product offerings and engaging marketing campaigns.

Section 3.2 provides more information on using the Destination Quiz.

2.5 The Traveller Profiles

There are seven traveller segments, per country, each with a detailed profile that provides an in-depth understanding of the traveller types from the market. The profiles include insights that will be helpful in developing marketing plans/materials and in creating or enhancing tourism products and experiences.

In this section we are going to review each of the elements addressed in the profiles using the Canadian market profile. To gain the most benefit from this review, download the Canada profile and follow along.

2.5.1 Accessing the Traveller Profiles

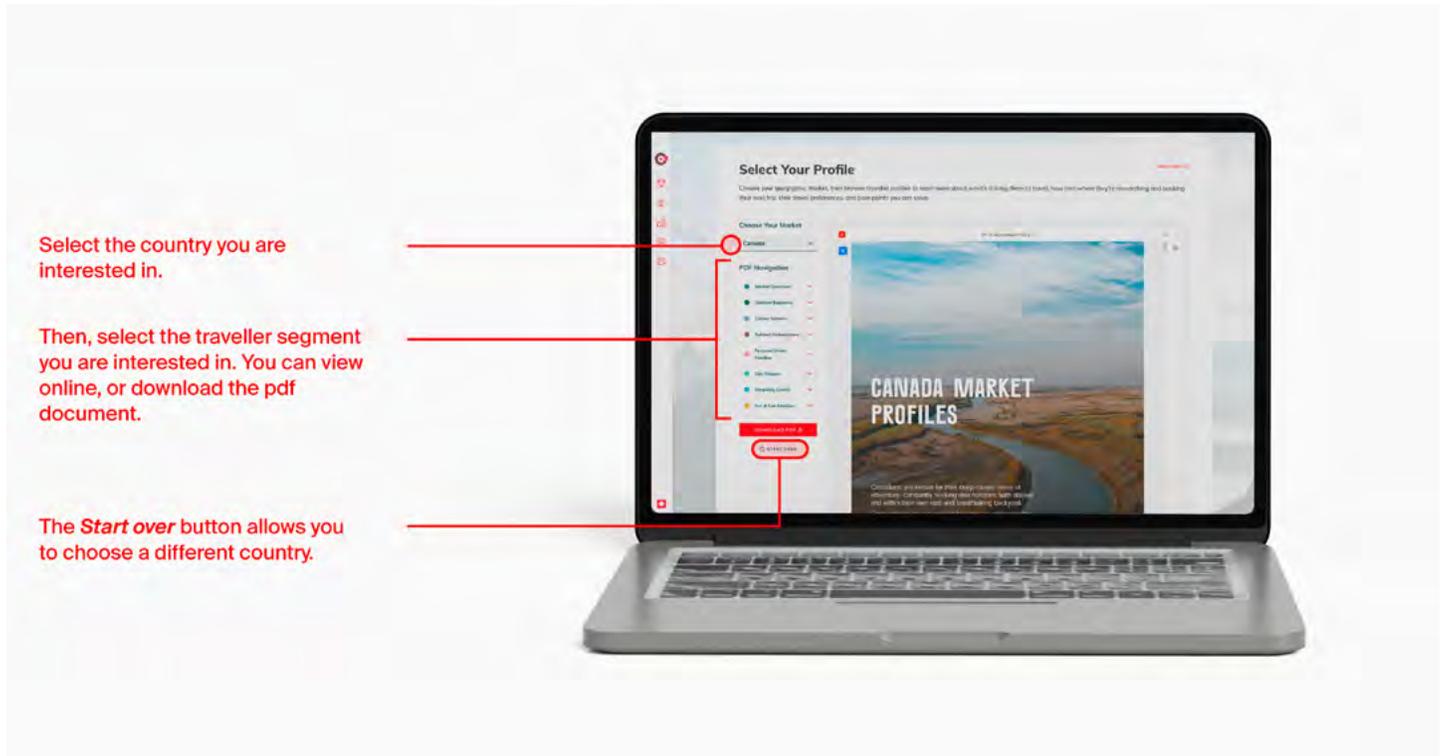
The traveller profiles can be accessed in the Canadian Tourism Data Collective: www.tourismdatacollective.ca

#1 On the left-hand menu, click first on the *luggage icon* for the Traveller section

#2 Click on *Traveller Segmentation Program*

#3 Select the *Visitor Profile & Insights*

Access to all seven profiles for Canada and nine international markets is located on the profiles *Visitor Profile & Insights* page



2.5.2 Geographic Market Profiles

Each of the 10 geographic market profiles begins with a four-page market overview that includes:

- Title page
 - Overall description of travellers from the market
- Guide to understanding the profile
 - Structure of the report
 - How to read the data
 - Helpful definitions
- Market overview and sizing with a:
 - Breakdown of the population by the seven traveller types within the geographic market
 - Breakout of outbound travellers by the seven traveller types for short-, mid- and long-haul travellers; and those who have ever travelled to Canada⁷
- Market segments overview showing:
 - Segment size
 - Likelihood to travel domestically (index) for the Canada Market
 - If the segment is a Destination Canada Priority Segment for international markets
 - The top three travel activities
 - Primary emotional travel motivations

Scores vs Indexes

Data is generally presented as a score or as an index:

Score – indicates the percent response and if it is representative of a large, moderate or small share of the segment.

Index – reflects a comparison of the score against the score for the market as a whole (all traveller types) which indicates differentiation. A high index (115+) means the segment over-performs relative to the overall market, whereas a low index (<85) indicates a segment that underperforms on the data point.

The critical data points are presented, with importance determined based on the data point having a high score or high index.

⁷ For the Canada Market Profile, this is travel anywhere within Canada.

Following the market overview are in-depth insights into the seven traveller segments with detailed information organized by data categories. For many categories, an overall insight is provided at the top of the page. This is an excellent way to quickly identify some of the primary characteristics of the traveller type.

Psychographics – Summary (pg. 5⁸): A summary overview that includes:

- High-level description of the traveller type.
- List of main things you need to know about them.
- Emotional Travel Motivations Map that compares the type to the average for the market.
- Traveller Responsibility and Economic indexes.

Our Psychographics – Travel Values (pg. 6): Comprehensive insights into what drives this traveller type, including their primary travel values, emotional motivations for travel and the keywords that best describe the personality of their desired destination. It identifies the most:

- Important travel values and attitudes statements from a listing of 44 paired statements (e.g., I'm passionate about travelling vs. I travel when I need to; I'm open to travelling to destinations with limited tourist infrastructure vs. I prefer destinations with well-established tourist infrastructure). Appendix 2 provides a complete listing of statements.
- Six important statements (e.g., To feel connected with new people; To open my mind to new perspectives) from a listing of 25 base emotional motivations to travel statements (Appendix 3).
- Relevant words used to describe the personality of desired destinations (e.g., Open, Peaceful, Luxurious) (Appendix 4).

Our Demographics (pg. 7): Information on passport ownership, population and household characteristics, specifically:

- Age, gender, household composition.
- Household income, employment, education, immigration status.
- Where they live (provinces, top states, regions).

Our Behaviours – Travel Habits (pg. 8-9): Information about when and how the segment travels, including:

- Propensity to use travel agents/operator-assisted channels for free independent travel.
- Desire to travel as part of an organized group.
- Typical seasons when travel, duration and types of trips.
- Views of Indigenous travel and interest in learning and exploring.
- Values related to willingness to learn and explore (Appendix 2).
- Most typical types of accommodations (full listing in Appendix 5).

Our Behaviours – Travel Style (pg. 10): Insights on primary travel behaviours and preferences including:

- Their travel companions.
- Average trip spend and, if sufficient responses, additional spend details.
- Spending style (i.e., budget to luxury).
- Thoughts on responsible travel (Appendix 3), including how they prioritize sustainable travel.

8 Page numbers are based on the Outdoor Explorers section of the Canada Market Profiles. Other traveller types will follow the same content order of but have different page numbers.

Our Behaviours – Travel Activities (pg. 11): Insights for product, market and destination development aligned with the most desired travel activities, specifically identify the:

- Twelve most important categories of activities (e.g., nature experiences, local cuisine, guided tours) from 14 categories (Appendix 6).
- Top indexing activities within the categories (e.g., hiking, nature walks within Nature Experiences, or wineries, breweries within the category Local Cuisine (Appendix 6).

Our Behaviours – Why We Travel (pg. 12): Provides data about the internal (e.g., to relax and unwind) and external (e.g., family/friends wanted to go) triggers for taking a trip, for two trips lengths:

- No flight/flight of less than three hours and a flight of three to seven hours (Canada and the US).
- Flights of three to seven hours and more than seven hours for other markets.
- Insights on aligning travel with school schedules and major holidays and if it is difficult to take more than a few vacation days at once.

Our Behaviours – How We Plan (pg. 13): Provides insights on researching, planning and booking trip accommodations, transportation and activities, specifically:

- When they start to research and plan their trip.
- When they book each trip element.
- Most common method to research, plan and book each of the trip elements.
- Indication of the degree of influence they have on group travel decisions.

Our Behaviours – Trip Types (pg. 14): Provides information about the different types of trips taken and how well they align with the segment's idealized trip (based on emotional motivations, trip triggers, desired destination personality and activities). Includes the following detailed information for the four main trip types taken:

- Type of trip (defined in terms of destination type/companions).
- Share of total trips the trip type represents and segment alignment (five filled circles means fully aligned).
- Destination type (Appendix 7).
- Travel companions.
- Three primary emotional motivators for the trip type.
- Three main activities enjoyed by the trip type.
- Key behaviours associated with the trip type.

Our Behaviours – Where We Go (pg. 15): Provides information for destination managers to assess how well their destination aligns with what the segment is looking for based on where they like to go and functional needs. Specific data elements include:

- Countries visited and destinations interested in visiting.
- Top eight desired functional benefits from a destination (Appendix 4).

Our Behaviours – Thoughts on Canada (pg. 16-17): These two pages offer insights into the segment’s knowledge and perceptions of Canada and helpful information to assess interest in your destination. Data points include:

- Provinces have visited before (amongst those who have been to Canada) and places would like to visit.
- Season when visited.
- Likelihood to travel outside their home province (for Canada) in next two years.
- Likelihood to visit Canada in next two years (all other markets).
- Familiarity with Canada⁹.

Our Behaviours – Life Outside of Travel (pg. 18): Rounds out the profile by providing insights on major life events and behaviours outside of travel that may have an impact on travel, including:

- Major life events experienced in previous five years. (Appendix 8)
- Travel and five other top non-essential spending priorities out of nine. (Appendix 8)

EQ Mapping – Market Level Distribution (pg. 103): Provides insights into how the new traveller segments disperse across the historical EQ segments in the market.

Glossary (pg. 104): Helpful terms are included at the end of each profile and Appendix 1.

There are several features and benefits that once ready in 2025, will only be available to Canadian Tourism Data Collective paid partners.

These include:

- **PRIZM Mapping:** Indicates the alignment of PRIZM clusters for the US and Canada traveller segments..
- **Media Profiling:** Provides information to support media planning based on links to PRIZM.
- **Finding us on Google:** Provides insights on creating custom audiences within Google’s targeting tools.
- **Finding us on Meta:** Provides insights on creating custom audiences within Meta’s targeting tools.

Contact Destination Canada if you would like more information on becoming a Data Collective partner organization.

⁹ Not provided for the Canada market profile.

3 IDENTIFYING YOUR TARGET AUDIENCES

Understanding your ideal guest is key to creating targeted, impactful marketing and development strategies. Destination Canada's suite of tools and resources is designed to help you identify and prioritize the traveller segments most aligned with your destination or business.

Two online resources that are part of the segmentation program are:

1. The Traveller Quiz is a five-part interactive tool that reveals an individual's traveller type. Destinations and businesses can use it to understand their ideal guests better and determine how to align with Destination Canada's traveller segments.¹⁰
2. The Destination Quiz is an eight-part interactive tool that invites a destination or tourism business to input the characteristics of their business and destination to identify the traveller segments that are most likely to find their destination appealing.

Other options to identify target segments include:

- Aligning with Destination Canada's priority segments to leverage national strategy.
- Reviewing provincial level visitation figures from the Global Traveller Research Program (coming 2025).
- For partners with access to mobility data through Environics and Envision, they will be able to determine segments using geodemographic data (coming 2025).

3.1 The Traveller Quiz

The Traveller Quiz is designed to help identify traveller types, thereby providing an opportunity to promote the products and services that a traveller is most likely to be interested in experiencing.

3.1.1 Elements of the Traveller Quiz

There are five sections in the quiz that individuals are asked to complete:

1. The country where they live.
2. Their travel values (comprised of nine questions).
3. Their ideal leisure trip companion(s) (six choices).
4. Their ideal leisure trip activities – they must select a minimum of one and a maximum of six from a list of 14 options.
5. Their ideal trip benefits – they must select a minimum of three and a maximum of eight from a list of 18 options.

Once completed, a results page will appear that identifies:

- Their traveller type
- A short description
- Why they travel
- Their ideal destination
- Canadian experiences they may like



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

10 Partners of the Canadian Tourism Data Collective can access the quiz algorithm know as a 'typing tool' to insert into their own research surveys.

3.1.2 Using the Traveller Quiz

The Traveller Quiz is a fun tool that can be employed with travellers and staff to assist in identifying the travellers who are coming to a business or destination and as a tool to excite people to learn more about the segmentation program and the types of travellers visiting Canada. It is the first step to determining opportunities for product/experience development and marketing.

Ways To Engage with Travellers

The Traveller Quiz can be used in a variety of ways. Here are a couple of thought starters:

- Set up an area in your Visitor Information Centre to allow visitors to do the quiz. Staff can then provide information about local tourism experiences that are aligned with their interests thereby driving sales to businesses in the region.
- Ask visitors coming to your attraction/site to do the quiz to help you understand the segments that are visiting/purchasing your experience.

While the quiz results provide insights to help you understand who is visiting, it is important to be cognizant of where and how it is being used to determine whether it is providing statistically significant research. Results should be used cautiously and combined with other research to obtain a more accurate picture of overall visitation.

Visitor Typing Tools Available to Canadian Tourism Data Collective Partners

If your destination/organization is a paid partner of the data collective, you are able to incorporate global and market specific, segment typing tools directly into your research:

- **Short-form version:** This 3-minute version uses the same questions as the Traveller Quiz and is best used when the survey experience needs to be short or when the questions are being incorporated into a longer survey.
- **Long-form version:** This 4-minute version includes additional questions that increase the accuracy of the segment assignment. It is most suitable as a standalone survey or incorporated into a shorter survey.

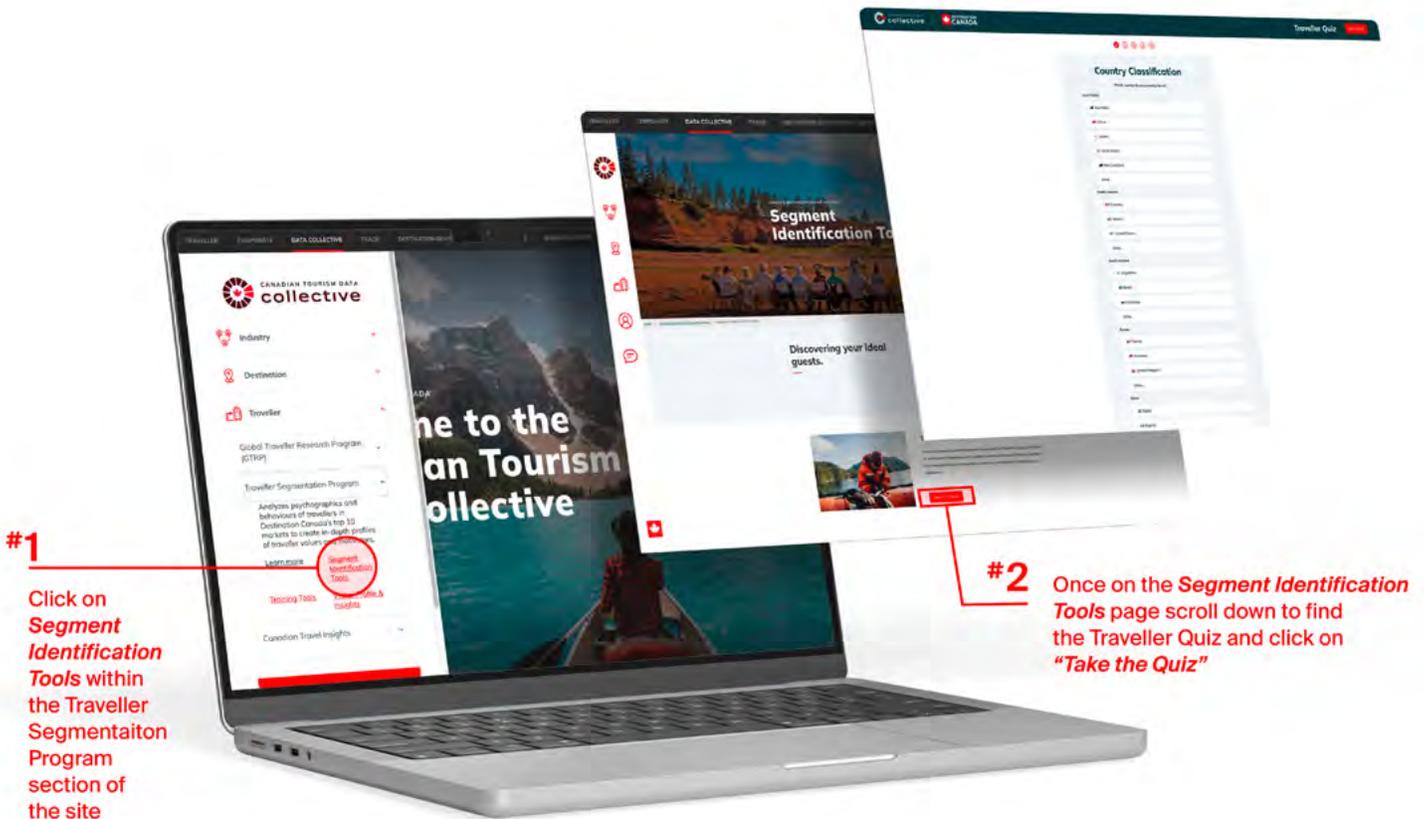
Ways to Engage Your Team and Other Internal Audiences

The Traveller Quiz is also a helpful tool to introduce the segments to staff, partners and contractors. Having people complete the quiz and know their traveller type is helpful in:

- Understanding the mix of traveller types on your team and shifting discussions beyond demographics to appreciating the different values, attitudes and motivations each person brings to the conversation.
- Discovering the richness of the information in the different traveller segments and how it can inform different parts of the organization's activities.
- Identifying why tourism experiences in the area may more strongly appeal to one traveller type over another.
- Uniting people with a common language and understanding the different segments and their needs.

3.1.3 Accessing the Traveller Quiz

The Traveller Quiz can be accessed through the Canadian Tourism Data Collective: www.tourismdatacollective.ca



3.1.4 Other Sources for Traveller Visitation Data

In addition to the new Traveller Quiz, there are other resources that can be helpful in identifying the segments visiting your destination or business and the opportunity each presents:

- Provincial visitation volume by segment data
 - In 2025, partners will be able to review segment level sizing for key provinces and areas within Canada from the Global Tourism Research Report.
- PRIZM segments
 - Destination Canada has linked their traveller segments to Environics Analytics' PRIZM segmentation framework for Canada and the US. For partners, who purchase mobility data from Environics (which is not included within the Destination Canada Data Collective agreement) and who are paid partners of the Canadian Tourism Data Collective, in 2025 it will be possible to use mobility data to determine which Canadian and US segments are visiting specific areas based on the postal codes and zip codes associated with devices.

3.2 The Destination Quiz

The Destination Quiz was designed to help destinations/businesses identify which traveller segments best align with their destination.

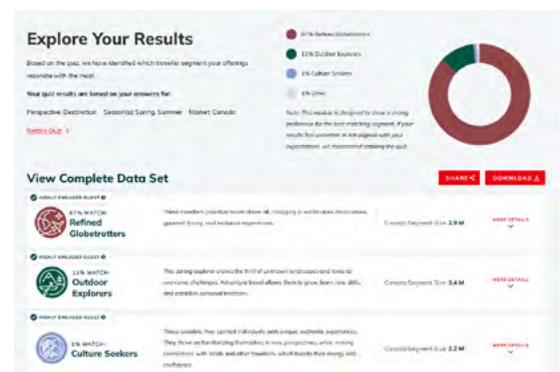
3.2.1 Elements of the Destination Quiz

Individuals completing the quiz on behalf of the destination/business will be asked to input information into several sections.

- 1. Quiz Introduction:** The quiz summary emphasizes the importance of setting the context before answering questions about destination benefits, activities and features.
- 2. Destination-Perspective Context:** Indicate the perspective you are taking in completing the quiz: (1) a destination, (2) a business only (e.g., an activity operator) or, (3) a combination of the two (e.g., a hotel which is a business that often adopts a broader destination perspective).
- 3. Season Identification:** Choose one of four seasons or choose year-round.
- 4. Country Classification:** Select one of Destination Canada's 10 target geographic markets you wish to focus on (e.g. Canada, France, Japan, US).¹¹
- 5. Destination/Business Functional Benefits:** Select a minimum of three to a maximum of eight destination benefits from 24 options (e.g. easy to travel to, offers options for adrenaline seekers).
- 6. Destination/Business Activities:** Select a minimum of one to a maximum of six from a choice of 14 options for activities offered in your destination (e.g., guided tour, nature experiences, shopping). Each option has a pop-up description of what is included with that choice.
- 7. Destination/Business Personality:** Select a minimum of three and a maximum of eight words that describe the personality of your destination or business from a choice of 24 options. (e.g. charming, reliable, trendy).
- 8. Destination Type:** Think specifically about the destination and choose ONE way to describe the destination (e.g. Arts and cultural hub, island getaway, beach resort, small town). If selecting a single option proves challenging, complete the quiz by choosing the response that resonates most closely with your destination's attributes. Once you receive the response, download it and then repeat the quiz and choose an alternative response; download and compare the results.

Once complete, a results page identifies your top traveller types. Here is a partial sample, it includes:

- The top three matching segments for the country selected.
Note, the quiz is designed to place a strong emphasis on the top-matching segment.
- Short descriptions of the segments.
- Segment size (for the country selected).
- If the segment is a DC priority segment (international markets only).
- If the segment is a Highly Engaged Guest segment.
- The ability to reveal additional details on the segment's top travel activities and emotional travel motivations.
- The ability to reveal the same information for the remaining segments.
- The ability to download a PDF of the full quiz results (all segments).



¹¹ If completing the quiz for a market that is not one of Destination Canada's 10 markets, indicate "Other" and result will be based on a global algorithm.

3.2.2 Using the Destination Quiz

The Destination Quiz is a new tool for identifying your primary traveller segments within Destination Canada's 10 markets.

The primary way to use the Destination Quiz is to assess your current situation by answering the questions based on how things are right now. This will identify the segments that you are most likely attracting. Be honest when selecting options, especially regarding the benefits you offer. The results will be most accurate if you focus on the eight most attractive benefits, the maximum you can select. If you want to explore different scenarios with different benefits, redo the quiz.

Once you have completed the quiz based on your current context, consider re-doing it thinking about a different season. How do your responses to the questions change based on answering them from the perspective of summer vs. winter, or spring or fall. This way, you can see if the priority traveller segment is the same year-round or differs by season.

You can also explore future scenarios based on your strategic plan to reach new markets:

→ **Known infrastructure changes (approved and funded)**

- Identify the impact of new infrastructure investments on your priority traveller segments.
- What could this mean to the destination's marketing and management activities?

→ **Potential infrastructure changes (desired but not yet approved/funded)**

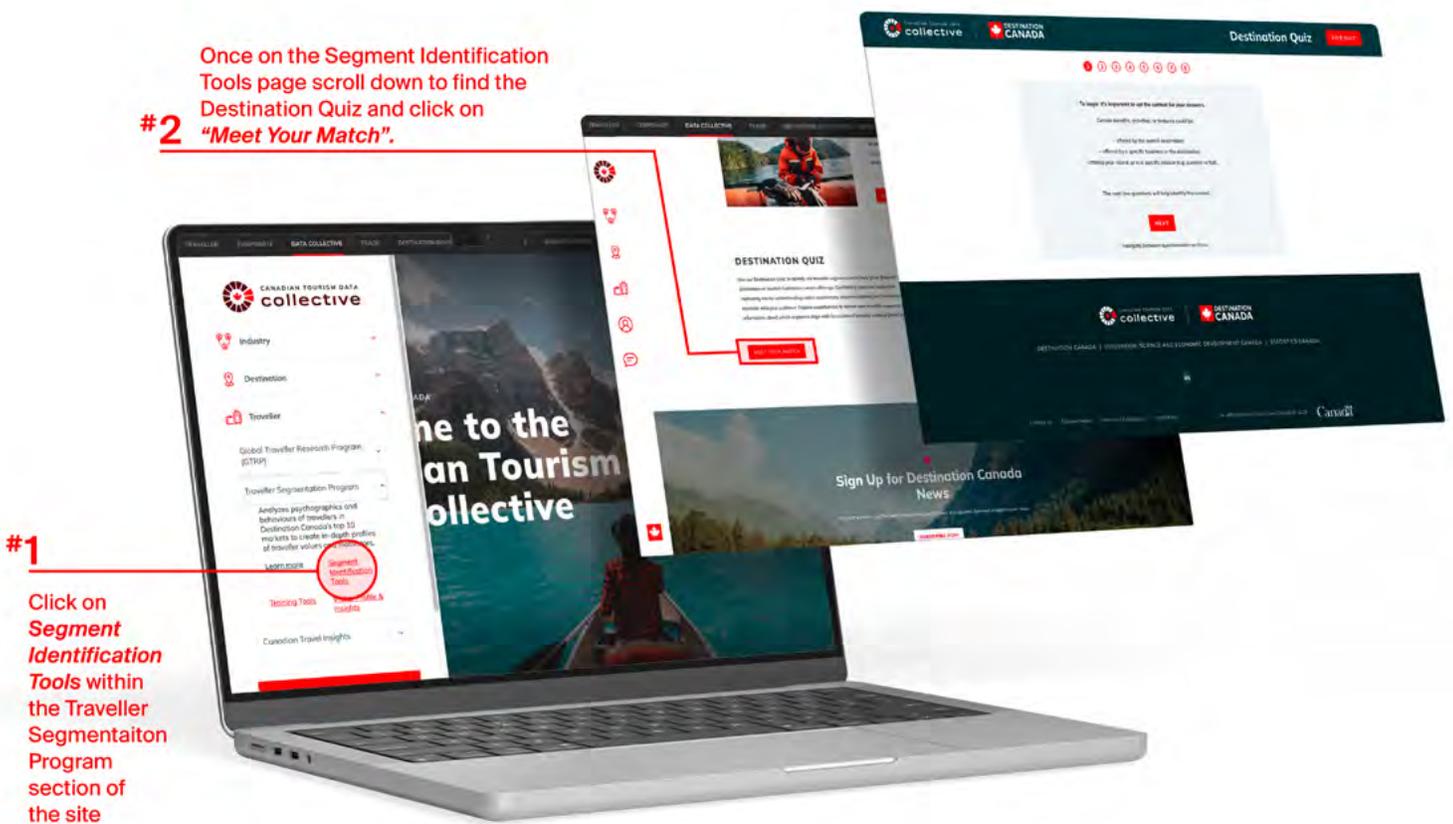
- Identify the impact of potential infrastructure investments (before investing).
- How can you use this knowledge to obtain support from other tourism businesses and potential funding?

→ **Rebranding**

- Assess the impact of different personality characteristics on your priority traveller segments.
- Do they strengthen or weaken the alignment with your primary targets?

3.2.3 Accessing the Destination Quiz

The Destination Quiz can be accessed through the www.tourismdatacollective.ca



Now that you have a sense of which segments are your priority targets, let's look at how to apply the the information contained in the market profiles. And if you are interested, check Appendix 10 for conceptual way of defining opportunities based on the traveller types that are visiting and the appeal of your destination.

4 APPLYING PROFILES

Destination organizations and businesses can use traveller profiles in many ways. Table 1 highlights areas where the research and traveller profiles offer valuable insights.

Table 1: Profile Applications

Function	Potential Application
Marketing	<ul style="list-style-type: none"> • Creative briefs • Campaign planning • Development of marketing content, especially copy and image selection • Media planning and buying • Building audiences in Meta and Google • Identification of most aligned products/experiences to highlight for digital marketing campaigns • Developing familiarization trips and working with influencers
Product / Experience Development	<ul style="list-style-type: none"> • Assess the strength of alignment of existing experiences with your target travellers • Design new/enhanced experiences • Identify potential partners for experience delivery
Destination Development	<ul style="list-style-type: none"> • Experience audit of existing destination assets with the seven traveller types • Itinerary development throughout a destination • Identify product/experience strengths and gaps within the destination • Identify tourism infrastructure enhancements
Research	<ul style="list-style-type: none"> • Identify areas requiring further analysis • Respondent selection for qualitative and quantitative research
Travel Trade	<ul style="list-style-type: none"> • Identify potential operators/partners for experience delivery • Design new/enhanced experiences and itineraries • Inform marketing
Training and Education	<ul style="list-style-type: none"> • Staff capacity building exercise to understand the segmentation program, learn the traveller types of team members, develop a common language and framework for decisions • Externally with operators, partners, collaborators, etc. • Provide the research to tourism programs at universities and colleges so professors can introduce students to Destination Canada and incorporate the research into their courses

Now, let's look at how you can apply insights from the profiles. To get you started, the next two chapters take you through a few applications related to marketing and product/experience development – check them out!

5 APPLYING THE TRAVELLER INSIGHTS TO MARKETING

This chapter illustrates how to use the information in the traveller profiles for three marketing applications.

- Developing a creative brief
- Choosing imagery
- Writing copy

Examples and activities will show how the research informs marketing decisions. To help you apply the research, it's best to have the Canadian Outdoor Explorers and Purpose Driven Families profiles handy.

5.1 Understanding Indexes Versus Percentages

In Chapter 2, scores (percentages) and indexes were introduced. Given their importance in understanding and applying the research, this chapter addresses them more fully.

What are Indexes and Scores/Percentages?

An index and a percentage are two ways to measure data in research, but they work differently. A percentage, also labelled a score in this research, shows the part of a whole as a fraction out of 100. For example, if 30 out of 100 people like coffee, the research would report that 30% of people like coffee. This is useful when you want to show the size of what you're looking at.

Conversely, indexes compare how much something has changed over time (i.e., a consumer price index) or as in a market segmentation program, to show how it differs from a base value (i.e., the overall market). Indexes compare something to a standard value, usually set at 100. If the index is 120, it means the value is 20% higher than the standard or average (100). If it's 80, it means it's 20% lower than average.

Let's look at an example. Turn to page 12 of the Canadian Outdoor Explorer profile. At the top of the page is a section labelled "Internal Trip Triggers." Read the 2nd line "for adventure and excitement." Then read columns 2 and 3 in the table for the section on 0 to 3 hour / no flight trips. You will see in the SCORE column that 48% are motivated to take a short-haul trip for adventure and excitement, which means 48 out of every 100 people. An even larger percentage, 55%, travel to relax and unwind. So, should you focus on incorporating time to relax and unwind into your marketing? Not necessarily.



OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHY WE TRAVEL



 INTERNAL TRIP TRIGGERS	TRIPS OF FLIGHTS OF 0-3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3-7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	55%	82	48%	66
For adventure and excitement	48%	137	58%	143
To escape from routine	37%	79	35%	76
To spend time with family	31%	83	32%	94

Now read the INDEX column and you'll discover that the index for adventure and excitement is 137. This means this trip trigger is 37% higher than the average across all traveller types within the market. In comparison, relax and unwind indexes at 82. This means that Outdoor Explorers are less motivated by relaxing and unwinding on a trip when compared to other traveller types in the market.

Interpreting Indexes vs Scores is a critical distinction. Percentages indicate „how much“ of something exists and indexes show „how something compares“ to a standard or average.

Throughout the profiles, colour is used to help you quickly identify differences. A blue index means it is significantly higher than other traveller segments (index of 115+), orange is significantly lower (index below 85) and grey indicates it is average.

The Implication:

Suppose a marketer wants to appeal to an Outdoor Explorer with a particularly attractive message. Which message should be the focus?

- To relax and unwind, or
- For adventure and excitement

A message focusing on relaxing and unwinding may appeal to a larger audience; however, because it indexes lower than average (82), this feature may be less appealing than focusing on adventure and excitement, which indexes 137! The bottom line is that while percentages are useful, indexes are critical to helping focus your marketing and product development more effectively than basic scores or percentages.

Let's now compare the exact same short-haul trip triggers to the Fun & Sun Families segment to illustrate the differences.

- Relax and unwind (line 2) has a score of 74% and a high index of 130, whereas
- Adventure and excitement (line 4) has a score of 22% and an average index of 87.



INTERNAL TRIP TRIGGERS	TRIPS OF FLIGHTS OF 0-3 HOURS / NO FLIGHT		TRIPS OF FLIGHTS OF 3-7 HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	86%	152	76%	150
To relax and unwind	74%	130	76%	129
To escape from routine	54%	121	53%	118
For adventure and excitement	22%	87	21%	85

To attract this segment, you would showcase experiences and marketing messages highlighting families relaxing and unwinding. Other messages that focus on escaping from the routine of daily life, with a score of 54% and a 121 index and spending time with family, which has the highest score (86%) and the highest index (152), would also be appealing to this segment.

Why is this important?

It's important to look at both the index and the percentage because they offer valuable insights that help you better understand the important differences among the seven traveller segments.

- Indexes show what makes each traveller segment unique so you can tailor marketing to specific traits.
- Percentages show which characteristics most appeal to travellers, helping you create marketing messages that reach a wider audience and attract more visitors.

The second page of each market profile includes a brief outline of how to read the data. If this How-to-Guide is not available, use it as a quick reference when working with the profiles.



**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

5.2 Developing a Creative Brief

The seven segment profiles for Destination Canada's nine international markets plus Canada offer valuable insights to help you create effective marketing campaigns, especially when working with an outside marketing or creative agency when you may need to develop a creative brief. These profiles describe your target audience and highlight their interests and motivations, helping you choose images and messages that resonate with them.

The profiles also include information about when people plan their trips and where they look for travel inspiration. This helps you pick the best time to launch your campaign for maximum impact.

5.2.1 Describing Target Audiences

When describing a target audience in a creative brief, highlight the most relevant details about your target segment(s) and the type of campaign you want to run.

Using the Canadian profile for Outdoor Explorers, we'll walk through where to find insightful cues about this traveller type to describe the target market in a creative brief and understand how the insights can be used to inform the development of your marketing campaign.

Summary (pg. 5)

Each segment profile begins with a summary page. Look for words and phrases that provide an understanding of who these travellers are to add to your creative brief. For example, by reading all the content on the page, you can surmise that Outdoor Explorers:

- Seek to grow, learn new skills and establish personal traditions
- Are adventurous, daring explorers who crave the thrill of unknown landscapes and overcoming challenges
- Often enjoy adrenaline-producing physical activities
- Want to make a positive impact when they travel
- Enjoy new and authentic experiences
- Want to engage with locals
- Relish nature-related experiences
- Desire getting off-the-beaten path

Travel Values and Attitudes, Emotional Motivations and Desired Destination (pg. 6)

On this page, a focus on indexes when reading the travel values and attitudes, emotional motivations and desired destination descriptors is important. Elements with a high index identify what differentiates this traveller type from others, such as:

- I like my holiday to have some form of physical activity (index 144)
- Open to unconventional accommodations (index 135)
- To feel a sense of adventure (index 147)
- To push my limits and challenge myself (index 135)
- To feel like I have accomplished something (index 131)

Pay attention to high scores as they show what's important to most people in this segment, even if those elements don't stand out as unique, such as:

- I like to come back from travels having learned something new (score 80% and index 118)
- To explore and discover new things/places (score 54% and index 122)

For Outdoor Explorers, feeling a sense of adventure, having some form of physical activity and pushing limits to challenge themselves are primary travel motivators. While they index somewhat lower for learning, it is important to a large share of the segment. The high score (56%) and index (149) for adventurous as a desired destination characteristic further emphasizes the strength of this attribute in appealing to Outdoor Explorers. Including these descriptors in your creative brief will help your marketing department/agency position exploration, discovery and learning through adventure, challenge and accomplishment to hit the right note with this segment.

Demographics (pg. 7), Travel Companions and Budget (pg. 10)

Including information about your target market's demographics, travel companions and budget is helpful in a creative brief to inform image selection, developing written copy and communicating pricing messages:

- Age, gender and whether they have children indicate the stage of life and can support image selection to ensure the people within the photo align to your target audience, whether images should include families and what ages of children are most relevant. Outdoor Explorers are often between the ages of 18-34 (37%, index 120), skew slightly more male (55%, index 111) and are less likely to have children living at home (57%, index 107).
- Household income and budget data can help tailor pricing messages and guide the types of experiences featured in a campaign. Outdoor Explorers are mid-range spenders.

What does this mean for Outdoor Explorers?

- Use images that feature younger adults and forego images with children.
- As travellers with mid-level household incomes and a mid-range spending style, promotional pricing messages will likely be of interest.

Indigenous Travel and Willingness to Learn and Explore (pg. 9), Thoughts on Responsible Travel (pg. 10)

These pages in the profile provide an understanding of the segment's values and attitudes concerning learning, exploration, Indigenous and responsible travel and information that can assist your agency with image selection and messaging.

When it comes to these aspects of travel, Outdoor Explorers:

- Are keen to hear stories and engage with Indigenous people (56%, index 118).
- Score and index highly for visiting less explored destinations (79% and 137), putting in the effort to see lesser-known places (74%, index 135) and travelling to places with limited tourism infrastructure (59%, Index 138). They also index highly for visiting destinations with challenging climates/weather conditions (41%, Index 133).
- Are not significantly more interested in ensuring they travel responsibly. While they score moderately (between 38%, index 54%) for all responsible travel attributes, the areas they index most highly for are stating they have a commitment to sustainable travel and actively take steps to minimize their impact on the environment when travelling (38%, index 114) and hearing from underrepresented communities is an important part of travelling (46%, index 113).

Using these insights while showing passive activities (e.g., watching/listening to an Indigenous Elder or Indigenous performance) can be appealing. However, presenting Indigenous-led activities that address Outdoor Explorers' base motivations of adventure, challenge and accomplishment will be more appealing.

As travellers who don't mind challenging climates or weather conditions, destinations with limited tourist infrastructure, or places that are off-the-beaten path; they are open to marketing messages and images that feature less explored places and shoulder/off-season experiences.

Top Travel Activities (pg. 11)

This page details the top desired travel activities. A creative brief can help your agency identify the experiences to feature in a campaign that is likely to resonate most strongly with your target audience.

Outdoor Explorers over-index for all outdoor activity categories, especially those that are physically active:

- Nature experiences (70%, index 146), primarily hiking and nature walks (38-46% with indexes of 149-152).
- Water-based sports, casual sports, winter-based sports and high-intensity sports have lower scores (5-25%) and high indexes (132+).

The high indexes that Outdoor Explorers have for these activities illustrate how their desire for personal challenge, adventure and nature define how they like to travel. They are adventurous, outdoorsy travellers who enjoy physical activity in natural environments.

Cultural experiences/attractions, while of interest to many (48%), do not index highly (87) and would be a secondary element, if included, in any marketing materials focused on this segment.

Trip Triggers (pg. 12)

This page focuses on internal and external triggers that motivate travel for short-haul/no flight and mid-haul (<3 hours flight)¹². It is provided in a creative brief as input to context and messaging. Focus on the triggers that score and index highly. Secondary elements are those that index highly or score highly.

¹² For overseas markets, the information is presented for mid-haul and long-haul (7+ hrs.) flights.

For Outdoor Explorers, the primary internal triggers are:

- Adventure and excitement (high score and index) for both short- and mid-haul.
- Personal reflection and growth and have memories from top travel spots (high indexes and lower scores) for short haul.
- Relax and unwind (high score and low index) for short- and mid-haul.
- Escape from routine and spending time with family have low indexes for short haul and low/average for mid-haul.

No external triggers distinctly differentiate Outdoor Explorers from other segments (i.e., none that index highly). Outdoor Explorers are driven by internal motivations such as adventure, excitement and personal growth rather than external factors. While they value relaxation, they prefer to unwind through active outdoor activities, such as hiking or exploring nature, rather than lounging at a beach or spa. When reviewing the trip triggers, it is essential to look at the whole picture of the traveller, tying back to the travel motivations and values, to interpret the triggers.

Desired Destination Functional Benefits (pg. 15)

This page presents what Outdoor Explorers are looking for when choosing a place to visit. This information is included in a creative brief as it can affect image selection and messaging. Highlight and focus on the high-indexing and scoring benefits that align with your destination.

For this traveller type, some of the most important destination attributes with high scores and indexes are:

- Known for stunning natural landscapes (49%, index 143)
- Providing access to unique natural wonders (47%, index 148)
- Opportunities to view wildlife in its natural habitat (41%, index 141)
- Provides numerous outdoor adventures (39%, index 154)

In addition, the following destination attributes, while important to a small share, have high indexes and, in addition to appealing to the segment, differentiate it from others:

- Provides a remote, no-frills experience (13%, index 140)
- Options for adrenaline seekers (12%, index 148)

Life Outside Travel (pg. 18)

This section helps to round out an understanding of the segment, presenting major life events they have dealt with over the last five years and their non-essential spending priorities. While this information is unlikely to impact the images used or the messaging written directly, it does provide additional understanding and contextual information about the segment and could be helpful to include in the creative brief.

The „Overall insight” is a place to start, followed by a review of their major life events and non-essential spending priorities, particularly where travel sits.

Of the major life events addressed, a few are ones of note for Outdoor Explorers:

- Started a new job/career (36%) and moved to a new city (19%). Over-index for both these events.
- Purchased cars (40%) and renovated houses (26%). Though no more so than the market average.

In terms of non-essential spending priorities, Outdoor Explorers:

- Score highly for travel (60%) and savings and investments (51%), though no more than the market in general (i.e., have average indexes).
- Have lower scores for personal hobbies/interests and experiences such as concerts and events, though these are areas where they somewhat over-index (117).
- Under-index for personal care and wellness.

Their life outside of travel is active and reflects a somewhat younger demographic that is building their lives, and those moving into retirement.

5.2.2 Planning Timeline

Trip planning information is critical for a creative brief as it identifies the type of information the target traveller needs, where they look for it and when they want it. These insights directly impact the type of marketing materials developed and where and when they should be in-market.

“How We Plan” information is located on page 13. It addresses essential stages in the customer journey, from researching destinations to booking transportation, accommodation and activities – by trip length¹³ and the main sources of information. Trip planning insights for Canadian segments are provided for no flight/a flight up to 3 hours (short-haul) or a flight of 3-7 hours (mid-haul).

For Outdoor Explorers, visiting destinations that require no flight or a flight less than three hours they:

- Start researching and planning a little more than 3 months before the trip and turn to online videos as key source of information.
- Book accommodations 2.1 months (8-9 weeks) out, quickly followed by transportation (1.9 months, 7-8 weeks) and then activities 1.4 months (~5-6 weeks) out.
- Book accommodations and activities directly with the company.

In contrast, for trips involving a flight of 3-7 hours, Outdoor Explorers:

- Start researching and planning a little more than 4 months out and use travel booking sites/apps.
- Book accommodations first (11-12 weeks out) quickly followed by transportation using travel booking sites/apps.
- Book activities last, 1.5 months (6 weeks) out, and book directly with the company.

¹³ In Canada and the US, trip planning insights are provided for no flight/a flight up to 3 hours (short-haul) or a flight of 3-7 hours (mid-haul). For international markets, trip planning insights are provided for mid-haul flights and long-haul flights of 7+ hours

5.3 Choosing Imagery

The traveller profiles contain valuable information to assist with selecting images for a print media campaign that will resonate with the target traveller.

Throughout the remainder of the guide, activities are offered to learn about how to apply some of the information included in the profiles. The red icon will denote an activity.

ACTIVITY:

1. Read the description of two traveller segments:



Outdoor Explorers

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 nature-related experiences.



Purpose Driven Families

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

2. In the Canada market profile, locate the Outdoor Explorer segment (pgs. 5-18) and the Purpose Driven Family segment (pgs. 47-60). Read the first two pages of each profile.
3. Reflecting on what you just read, look at the nine photos and identify:
 - Three images that would likely have a strong appeal to Outdoor Explorers.
 - Three images that likely have a strong appeal to Purpose Driven Families.
 - Three images that would not be ideal for either travel segment.
4. Jot down your rationale for each of your selections.

When done, check the answer key in Appendix 11.



5.3.1 Assessing Images Using the Traveller Profiles

This section invites you to consider how the research can inform image selection based on travellers' values, attitudes and motivations (traits). Eight pictures are presented that are suited to either Outdoor Explorers or Purpose Driven Families. The traits the image conveys and highlights are identified and then the segment that is best aligned to those traits is indicated.

It is important to note that the traits of Canadian Outdoor Explorers may differ from those of Outdoor Explorers in other geographic markets. Don't assume that Outdoor Explorers are the same in all markets, as there are differences. Ensure you're referencing the research insights for the traveller segment you want to target in your geographic market of interest.

Photo

Traits Highlighted in the Image

**Aligned
Traveller
Segment**



- **Challenge/Sense of adventure** - expressed through the open water and little in the way of support
- **Unexplored** - there is a sense of being on their own in a remote/unexplored area
- **Off-the-beaten path** - no evidence of a marina or other tourism infrastructure
- **Water-based physical activity** - active people
- **Out in nature** - enjoying the outdoors



**Outdoor
Explorers**



- **Thrilling** - viewing bison in their natural habitat
- **Out in nature** - enjoying the outdoors
- **Unique** - it is not an experience that can be found/done everywhere
- **Discovery** - couple exploring on their own



**Outdoor
Explorers**



- **Sense of adventure** - what's ahead? Ties to explore and discover new things
- **Natural attraction** - stunning water-based landscape
- **Difficult to access** - willing to visit lesser-known places and destinations with challenging weather conditions



**Outdoor
Explorers**



- **Thrill and excitement** - high-intensity adrenaline-inducing activity
- **Natural attractions** - stunning landscape
- **Unique** - it is not an experience that can be found/done everywhere



**Outdoor
Explorers**

Photo

Traits Highlighted in the Image

**Aligned
Traveller
Segment**



- **Quiet seashore** – relaxing, no dangerous elements
- **Nature experience** – enjoying the outdoors
- **Bonding** – family sharing time together



**Purpose
Driven
Families**



- **Child centric** – family focused
- **Activity** – appealing to kids
- **Cultural** – something specific to an area
- **Learning** – potentially learning about how to fish for lobsters or the ecosystems in which they live



**Purpose
Driven
Families**



- **Multi-generational group** – family making memories together with older children
- **Natural attractions** – stunning landscape
- **Winter travel** – appeals to a specific market
- **Luxury** – professional ice sculptures in the background and general feel makes it seem somewhat luxurious



**Purpose
Driven
Families**



- **Activity** – family attraction, appealing to kids
- **Bonding** – family sharing time together
- **Cultural** – engaging with local culture
- **Learning** – potentially learning about farm life



**Purpose
Driven
Families**

Can one photo appeal to multiple segments?

Sometimes, an image can be suitable for more than one segment, as is the case with this image of the Edge Walking experience on the CN Tower.

Photo



Outdoor Explorers



Purpose Driven Families



Why it fits

- **Thrill and excitement** – showing a high-intensity activity.
- **Accomplishment** – given one looks scared but is doing it, so pushing their limits.
- **Unique** – not an experience that can be done/found everywhere

Why it doesn't

Outdoor explorers prefer to spend their time doing activities out in nature rather than in large cities.

However, they do, at times, take solo trips and are motivated by fun and adventure (refer to Trip Types data on pg. 14). If they were to find themselves in a large city that offered high-intensity activities, they might be interested in taking a break from museums and galleries to do this.

Why it fits

- **Activity** – desire high-intensity sports such as rock climbing and bungee jumping.
- **Challenge** – like to push themselves.
- **Bonding** – given the type of experience, one is likely to develop shared memories and bond with the people they are doing it with.

Why it doesn't

It is unlikely to appeal to Purpose Driven Families travelling with young children (86% of the segment have children <18 living at home).

However, it might be something done if the family has older children or the parents are hitting the city on a couple's trip (Trip Types data on pg. 56).

5.4 Writing Copy

Traveller profiles provide insights to create messaging that resonates with the target audience and is appropriate for where the content will be published. Focus on language that reflects their travel values, attitudes and emotional drivers. Writing about activities they're interested in can be effective; however, it will be even more impactful when activities are positioned in a way that taps into the target audience's values and motivations.

5.4.1 Assessing Copy Using the Traveller Profiles

Writing marketing copy is the art of crafting persuasive, engaging and concise messages that capture attention, build interest and inspire action. It's more than just putting words together – it's about choosing the right words to communicate the value of a product or service in a way that resonates with a target audience. Compelling marketing copy conveys benefits, evokes emotions and speaks directly to customers' needs and desires, ultimately driving them to purchase or take the next step.

Selecting the right words is crucial, as they shape the reader’s perception, build trust and differentiate a brand in a crowded marketplace. Copy has the power to transform casual readers into loyal customers. When writing copy, think about what makes your destination or business/experience unique and appealing to your target segment. It is important to embrace your unique voice and attributes in a way that is appropriate for the channel used.

We will continue using the Outdoor Explorer and Purpose Driven Families to illustrate the power of well-chosen words.

 **ACTIVITY:**

The purpose of this activity is to help you apply the research insights from the profiles to guide the words you use when writing copy to a specific traveller type. It is meant as an illustrative example, not to teach you how to write copy.

1. Continue to think about the Outdoor Explorers and Purpose Driven Families. While both are interested in the outdoors and spending time in nature, they value different things and will be motivated by different words and phrases.
2. Review the two examples of marketing copy below. Note that this sample copy is broad and is used to illustrate how different words/phrases appeal to traveller types. It is not meant to be an example of excellent copy.
3. List the values and motivations evoked by the words and phrases used. You will find the information you need on pages 5, 6, 9 and 10 for Outdoor Explorers and pages 47, 48, 51 and 52 for Purpose Driven Families.
4. Based on the traits evoked, which example is most likely to appeal to Outdoor Explorers and which to Purpose Driven Families?

Once done, check the answer key in Appendix 12.

<p>A: Forge New Paths. Embrace the Adventure.</p>	<p>B: Connect. Explore. Belong.</p>
<p>Discover the thrill of the unknown with Canada’s endless landscapes waiting to be explored. From unconventional trails to fresh, off-the-beaten-path experiences, every journey offers a chance to push boundaries and redefine adventure. Embrace the challenge, explore the unexplored and dive into outdoor activities that connect you with nature in unexpected ways. Whether trailblazing through dense forests or uncovering hidden gems, Canada invites you to move beyond the ordinary and experience the extraordinary.</p>	<p>Experience meaningful moments with your loved ones, where every adventure brings you closer. Whether bonding over shared experiences and ancestral stories or exploring Canada’s natural wonders, each experience becomes part of your family’s story. Stay in cozy lodges or scenic retreats that offer comfort without distraction, letting you focus on what matters most—being together while allowing you to stay in touch with the office. From guided nature walks with Indigenous guides to swimming at the beach, discover new ways to connect, recharge and make memories that last a lifetime. In Canada, every journey is a chance to grow closer, explore deeper and create traditions for the future.</p>

Copy A: Forge New Paths. Embrace the Adventure

Copy

Values and Motivations Addressed

Forge New Paths. Embrace the Adventure

Discover the thrill of the unknown with Canada’s endless landscapes waiting to be explored.

From unconventional trails to fresh, off-the-beaten-path experiences, every journey offers a chance to push boundaries and redefine adventure.

Embrace the challenge, explore the unexplored and dive into outdoor activities that connect you with nature in unexpected ways.

Whether trailblazing through dense forests or uncovering hidden gems, Canada invites you to move beyond the ordinary and experience the extraordinary.

Best fit for:

Copy B: Connect. Explore. Belong.

Copy

Values and Motivations Addressed

Explore, Connect and Create Memories.

Experience meaningful moments with your loved ones, where every adventure brings you closer.

Whether bonding over shared experiences and ancestral stories or exploring Canada’s natural wonders, each experience becomes part of your family’s story.

Stay in cozy lodges or scenic retreats that offer comfort without distraction, letting you focus on what matters most—being together while allowing you to stay in touch with the office.

From guided nature walks with Indigenous guides to swimming at the beach, discover new ways to connect, recharge and make memories that last a lifetime.

In Canada, every journey is a chance to grow closer, explore deeper and create traditions for the future.

Best fit for:

6 APPLYING PROFILES TO PRODUCT AND EXPERIENCE DEVELOPMENT

The information in each profile provides rich insights that can inform product and experience¹⁴ development decisions and help you deliver the travel benefits guests seek. As a development tool, the profiles can be used to:

- Assess how well your existing products and experiences align with the needs of your target travellers.
- Guide enhancements to existing products and experiences, packages, and itineraries to better meet the needs of your target travellers.
- Design and develop new products and experiences, packages and itineraries.

6.1 Developing Products and Experiences

This chapter highlights the profile information that is useful for assessing, improving and creating new products and experiences. Follow along using the **Purpose Driven Families** segment, located on pages 47-60 in the **Canada Market Profile**, to learn about this segment, the benefits they seek, what they value when travelling, appealing activities, trip triggers and elements that will inform developing memorable experiences.

6.1.1 A High-Level Look at this Segment

Begin by reviewing the segment summary on page 47 and the 'Overall Insights' sections at the top of many of the pages throughout the profile. These highlights provide an overall description and understanding of this traveller segment. You'll discover they seek family-driven experiences that balance a busy lifestyle with a desire for enriching and memorable travel experiences that allow for engagement with local cultures and exploring the outdoors and history. They are ambitious, conscientious parents focused on kid-friendly, culturally immersive and environmentally responsible travel. In addition to hidden gems, they want to visit places that offer a 'wow' factor to share with their friends.



6.1.2 What Purpose Driven Families Like to Do and Hope to Gain from Travel

To make it easier to use the profiles, key characteristics of the Purpose Driven Families profile are listed with page numbers for quick reference.

- The most **desired travel activities** are family-focused attractions, nature experiences, cultural experiences or attractions and festivals and events. Family-focused attractions and nature experiences are especially appealing to this segment (index high), while cultural experiences and festivals are of average appeal (Travel Activities pg. 53).
- Bonding through shared experiences is a **primary emotional motivation**. Other values and attitudes along with their **thoughts on Indigenous and responsible travel** include (pgs. 48, 51, 52):
 - Wanting to come back from travel having learned something new about the destination visited and its history and culture.
 - Learning about the Indigenous culture through storytelling and engaging with Indigenous peoples.
 - Supporting the local economy and communities open to diversity and inclusion.
 - Travelling sustainably, minimizing their impact on the environment.
 - Visiting the 'hot' places that people are talking about and then posting about it on social media.

14 The terms product(s) and experience(s) are used individually throughout this chapter to refer to both products and experiences.

In the Travel Activities section (pg. 53), the scores show the percentage of people interested in various activities¹⁵ which indicates the market size and popularity. The index column shows each activity's appeal compared to the average for the market overall. A high index indicates the activity has a stronger appeal to Canadian Purpose Driven Families compared to other traveller segments. A low index indicates a relatively low appeal. Indexes can provide helpful insights into market opportunities and product development when combined with scores.

Examples are presented to illustrate some product/experience development considerations based on how an activity scores and indexes in tandem with travel values, attitudes, emotional motivations, other high scoring activities and desired destination characteristics.

First, let's look at activities that score and index highly for Purpose Driven Families, such as zoos/aquariums and oceanside beaches. While there will be a natural draw to these activities, they can be made even more appealing by addressing the travel values, attitudes and emotional motivations of Purpose Driven Families (pg. 48). For example, to enhance appeal:

- **Zoos or aquariums:** Offer interactive and educational experiences about local wildlife and ecosystems that appeal to their values of learning and responsible travel. Develop interactive experiences that engage visitors in learning about and contributing to sustainable practices and conservation.
- **Oceanside beaches:** Consider developing activities related to conservation such as beach clean-ups or marine life tours. Highlight eco-friendly practices at the destination to appeal to their desire for responsible travel.



Now let's look at high scoring activities that have an average or low index such as cultural experiences or attractions, local cuisine, and festivals and events. These experiences also offer product/experience development opportunities. While the high-score indicates the activity is of interest, the lower index suggests it is of equal or greater interest to one or more of the other six traveller segments. This means the experience appeals to a broad audience.

¹⁵ There are over 100 activities that were measured, those presented score/index most highly

To strengthen the appeal for Purpose Driven Families:

- **Cultural experiences or attractions, local cuisine, and festivals and events:** Incorporate engaging, hands-on learning opportunities that captivate children and adults. Offer programming that delves into the destination's history and the Indigenous culture in a manner that will resonate with their desire for unique and impressive experiences.



A third example is **low scoring activities with a high index**. These activities appeal to a smaller, niche audience within the Purpose Drive Families segment. In this case, there are two approaches to consider:

1. Broadening the appeal by adding other activities with higher scores.
2. Focusing on the segment's travel values and emotional motivations to enhance the activity's appeal and present it in a new way.

For example:

- **Rock climbing:** Knowing that Purpose Drive Families score high for science centers, incorporate science-related learning opportunities into the rock-climbing experience such as environmental science (geology) and physics concepts (leverage). Connect guests to the unique aspects of the area's nature and ecology and consider how to best stage the rock climbing to foster a family bonding experience, enhance communications and build trust between parents and their children to attract families who are eager for meaningful experiences with physical activity.



Finally, activities with **low scores and a low index** indicate a niche audience with limited appeal, making them less ideal for product/experience development investment. If a low scoring, low index activity (e.g. bungee jumping) is your core business, look to other traveller segments where the activity scores/indexes higher and is a better fit with your business. Remember, you can't be all things to all people, so use the traveller profiles to find and align with guests who appreciate what your business or destination offers.

6.1.3 Who they Travel With

Travel style information for Purpose Driven Families (pg. 52) reveals they:

- Travel primarily with their spouse/partner (73%, index 121) and are more likely than other segments to travel with their children (67%, index 140).
- Sometimes travel with another adult relative (21%, index 97).
- Rarely travel on their own (10%, index 84) or with friends (5%, index 59).

Appreciating that 96% of this segment are between 18 and 54 years of age, consider what this means to designing learning experiences that will appeal to multi-generational groups and ensure families can spend time together.

For example:

- A science museum might offer a „build a rocket“ challenge where kids focus on fun assembly and adults explore the physics behind propulsion.
- On a guided nature hike, adults could identify plants while children track wildlife using activity sheets. Or design a family scavenger hunt that involves collaboration and offers shared activities that create memories.

6.1.4 When they Like to Travel

Information on Travel Habits is located on page 50 for Purpose Driven Families. Their preferred travel months are presented as a line graph for two travel distances: one that involves no flight/short-haul flight (<3 hours) and a second that involves a mid-haul flight (3 to 7 hours). When the pink line is above the grey line, it means Purpose Driven Families are more likely than the average to travel at this time. Specifically, they want to travel:

- During the peak summer months of June through September and December for trips closer to home (e.g., no/short-haul flight) and those further away (e.g. mid-haul flight).
- April for trips with no/short-haul flight.

Information on page 54 presents internal and external trip triggers based on travel distance, aligning with children's school activities, time off to vacation during major holidays and the difficulty of taking more than a few days off at one time to travel. When it comes to Purpose Driven Families:

- Family is the critical factor. They score and index highly on all triggers related to family (e.g., partner/spouse wanted to go, kids wanted to go) for trips close to home and further away.
- Relaxing and unwinding, while important to over half, is not a differentiating trigger.
- Learning through other cultures is a trigger primarily for trips farther away.
- This segment is differentiated from others in that their travel aligns with the school holiday calendar. They find it difficult to take more than a few days of vacation at once, finding it easier to take time off during major holidays.

To accommodate busy schedules, consider how you can offer experiences that both kids and parents enjoy at times that work for everyone in the family.

6.1.5 What they Hope to Gain from their Travel Experience

This section expands upon section 6.1.2 about what Purpose Driven Families want from a travel experience. Focus on characteristics with high scores and indexes such as:

Travel values, attitudes and emotional motivations (pg. 48):

- Address their preference to select destinations and activities that invest in socially responsible travel (67%, index 133).
- Incorporate opportunities that respond to their desire to post trips on social media (45%, index 120).
- Address their need to stay in touch with their obligations at home (46%, index 146).

Thoughts on Indigenous travel, learning and exploring (pg. 51):

- Examine if you can include learning about the Indigenous history of the destination (79%, index 119) or incorporate opportunities to hear stories and engage with Indigenous people (63%, index 128).

Reflect on how this traveller type's thoughts on responsible travel (pg. 52) can be factored into your experience design because they:

- Prioritize sustainable travel (49%, index 130).
- Want to hear from underrepresented communities (59%, index 131).

Here are a few thought starters:

- Use sustainable products and business practices. Tell visitors what you are doing and how you embody sustainability in your business values.
- Incorporate opportunities to learn about local history and culture. Consider partnering with the local Indigenous community to authentically incorporate cultural elements such as art, story-telling and traditional practices. Such a partnership can provide educational opportunities to deepen understanding of Indigenous history, culture and traditions.
- If developing products/experiences with Indigenous partners or in their community, ensure the cultural protocols are known, respected, and incorporated where appropriate.
- Incorporate photo opportunities into the experience – e.g., Instagramable moments.
- Check the availability of cell service or wi-fi where your experience is being delivered so participants can post to social media and parents can connect with work as needed. Prioritize delivery locations that have connectivity over those that don't.
- Consider including gear if your experience is outdoors and weather may be an issue so everyone is comfortable.
- Design opportunities to share experiences as a family that create life-long memories and deep bonding.

ACTIVITY:

Let's assess a science experience and see how well it aligns with Purpose Driven Families.

1. Read the experience description in Exhibit 1.
2. Assess how well the experience aligns with:
 - What they hope to gain from their travel experience (pg. 47 and 48)
 - When they are likely to travel (pg. 50)
 - Their travel companions (pg. 52)
 - Preferred travel activities (pg. 53)
3. Identify experience elements that are a good fit and those that are not.

Once done, compare your thoughts with those presented after describing the experience.

Exhibit 1: Experience Description

“Science in Action: Outdoor Exploration and Discovery“

Location: Science center with outdoor facilities, a nature reserve with a visitor center, or a science museum near a park.

When Offered: Daily July and August. Weekends April through June and September to November.

Duration: 3-4 hours (including breaks).

Theme: Discover the relationship between nature, physics and chemistry through exploration and experimentation in both indoor and outdoor settings.

Ideal Group Size: Family of 4-6



Activity 1: Nature Scavenger Hunt with a Scientific Twist (45 minutes)

- **Location:** Nearby park, forest trail, or garden.
- **For All Ages:** Go on a scavenger hunt to find plants, insects, rocks and natural patterns (e.g., spirals, symmetry). Children receive a list of items or phenomena to find—like a leaf with visible veins or a rock that reacts to vinegar.
- **For Ages 10+:** Use a magnifying glass and field guide to classify plants or insects and learn about local ecosystems.

Science Concept: Children explore biodiversity and the interconnectedness of living and non-living things. Bonus chemistry: Test small rocks with vinegar to identify limestone (carbonates).

Activity 2: Wind-Powered Engineering Challenge (45 minutes)

- **Location:** Open field or lawn.
- **All Ages:** Build simple windmills or kites using craft materials and see whose creation catches the most wind.
- **Ages 10+:** Create a mini wind turbine to generate small amounts of electricity to light an LED.

Science Concept: Learn about wind power, engineering design and the principles of aerodynamics.

Break: Picnic Lunch Outdoors (30 minutes)

Relax with a picnic lunch under the trees or by a water feature. Use the time to discuss how energy flows in nature, from the sun to plants and animals.

Activity 3: Sun Gazing with a Solar Telescope (45 minutes)

- **Location:** Outdoor observation deck or field.
- **All Ages (Daytime):** Use a solar telescope or solar filters to observe the sun's surface and spot sunspots.

Science Concept: Experience 'daytime' astronomy.

Activity 4: Outdoor Rocket Launch (30 minutes)

- **Location:** Open field or grassy area.
- **All Ages:** Build and launch a paper rocket powered by compressed air or a chemical reaction (Alka-Seltzer and water).
- **Ages 10+:** Experiment with different rocket designs and angles of launch to see which travels the farthest.

Science Concept: Introduces Newton's laws of motion and teaches how launch angle and air pressure affect flight.



Assessing the Experience Using the Research Insights

This experience is a strong match for Purpose Driven Families in several ways:

- Going to science centers and being in nature.
- Travelling with spouses/partners and kids.
- Appealing to a wide age range.
- Being open daily in the summer and on weekends during the spring and fall.
- Being able to do it together, offering quality time with others and bonding through shared experiences.
- Learning through fun experiments.
- Offering activities that allow them to post on their social media channels.
- Including activities that are challenging and offer a sense of accomplishment.

However, the experience does not address the importance Purpose Driven Families place on:

- Responsible travel.
 - Consider incorporating an eco-friendly picnic lunch using seasonal products from a local bakery packed in compostable or reusable containers.
- Indigenous elements.
 - Consider partnering with the local Indigenous community, to incorporate learning how Indigenous cultures engage with nature or astrology as part of the scavenger hunt.

6.2 Creating Travel Packages

Many different types of tourism businesses can develop a travel package. A basic travel package includes accommodations, food and beverage, a core experience and sometimes value-added components. Begin by reviewing the Purpose Driven Families profile, focusing on finding elements that could be included in a travel package and what considerations could be made when creating the offer.

Start with a review of their travel values and attitudes (pg. 48) and their thoughts on responsible travel (pg. 52).

This provides the following insights:

- They are committed to sustainable travel and actively take steps to minimize their environmental impact when travelling (44%, index 127).
- They believe it is important to support the local economy (59%, index 111).
- Some are open to unconventional accommodations (36%, index 110).
- Some think luxury experiences are important when travelling (36%, index 123).

And thoughts on packaging:

- Package with an accommodations provider that has implemented strong sustainability practices.
- Package with local businesses and communicate this to guests.
- There may be opportunities to explore packages that include different accommodation options or upsells.
- Consider packaging with suites instead of standard double beds.

Now extract other helpful packaging information from other areas of the profile.

- Travel activities (pg. 53) indicate local cuisine is not likely a selling feature (score of 48%, index 92).
- Typical accommodation (pg. 51) for most is a mid-priced hotel (56%, index 131). Staying at a vacation rental is also a popular option. Premium and budget hotels capture a smaller share (19% and 17% respectively), though they index highly (122) for budget hotels.
- Budget implications can be drawn from a review of household incomes (pg. 49) and their travel spend/spending style (pg. 52) relative to other travellers. They have moderate to high incomes with a mid-range to premium spending style.

These additional insights suggest:

- A food voucher for the hotel may be more appealing.
- Partner with mid-priced or budget hotels, aligned with the target type's activities for an attractive price point.
- Focus on developing a package that can be offered at a moderate price.
- Incorporate value-added extras to make them feel they are getting a good deal, such as including a family-friendly breakfast that will appeal to parents and children.
- Offer optional upgrades that appeal to those seeking more luxury (e.g., room or hotel upgrade, a basket of local food specialties).

In summary, a moderately-priced package with extras to create the feeling of a premium experience without high-end pricing will likely appeal to Purpose Driven Families.

6.3 Travel Trade

The traveller profiles provide travel trade insights through two indexes:

- 1. Travel Trade Index – Non-Group:** Shows the likelihood of using travel agents or operators for independent travel compared to all other segments in the market. It is based on ideal and future travel behaviours and excludes online travel agencies like Expedia or Travelocity.
- 2. Travel Trade Index – Group:** Indicates the likelihood of travelling in an organized group compared to all other segments in the market, based on preferences and details of their next planned trip. It is based on overall preference and specific information regarding their next trip.

6.3.1 Introducing Refined Globetrotters

Globally and amongst Canadian traveller segments, Refined Globetrotters are the most likely to use travel agents and advisors to plan their trips. Canadian Outdoor Explorers often rely on travel agents for trips within Canada as well, however Refined Globetrotters are the focus for this section.

Canada Traveller Segment	Travel Trade Index – Non-Group	Travel Trade Index – Group
Outdoor Explorers	88	102
Culture Seekers	97	105
Refined Globetrotters	150	145
Purpose Driven Families	97	102
City Trippers	85	87
Simplicity Lovers	93	71
Fun & Sun Families	71	74

We will refer to the Canadian Refined Globetrotters profile when working through in this section. It is on pages 33-46 of the Canadian Market Profile.



As Refined Globetrotters, we prioritize travel above all, indulging in world-class destinations, gourmet dining and exclusive experiences. We are experienced travellers always looking for new, unique places to cross off 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.

In addition to the Travel Trade Indexes (pg. 36), the profile includes insights on travel values and attitudes regarding preferences for guided tours and use of travel trade (pg. 34). These values-based insights can provide additional context to the Travel Trade Indexes.

Canadian Refined Globetrotters over-index highly in three areas:

- Enjoy joining guided tours to explore new destinations.
- Seek travel advice from travel agencies and agents.
- Expect 24/7 support from a travel provider when travelling.

Travel Habits (pg. 36) reveals that Refined Globetrotters are more likely than other Canadian traveller types to take trips of 1, 2, or 3+ weeks (indexes of 128, 129, and 125, respectively). They over-index for domestic leisure trips (117) and are especially strong (147) for international leisure trips.

Refined Globetrotters are an attractive market because they often travel outside peak summer months, especially on mid-haul flights (3-7 hours). They prioritize travel and spend more on non-essentials than other segments.

ACTIVITY:

1. Refer to pages 33–46 for the Canadian Refined Globetrotters segment
2. Review the values, attitudes, behaviours, travel style, activities and desired destination benefits for Refined Globetrotters to understand how they like to travel – what activities they want to do and what they are looking to get out of their travel experience.
3. Read the Ultimate Escape experience, in Exhibit 2.
4. Use a highlighter to note the attributes that are highly aligned. Use a second colour to highlight elements that do not fit.

The answer key is in Appendix 13.



Exhibit 2 – Experience Description

“The Ultimate Canadian Escape: Toronto and Niagara“

Duration: 5-7 days.

Mode of Travel: Private transfers, luxury train and scenic helicopter rides.

Accommodation: Iconic five-star hotels and boutique resorts.

Day 1-3: Toronto – The Heart of Urban Elegance

What to Do:

- **Shopping experience in Yorkville:** Explore high-end boutiques like Chanel and Hermès, with a personal shopper to curate your purchases.
- **Exclusive tour of the Art Gallery of Ontario:** Enjoy a behind-the-scenes tour of Canadian and Indigenous art collections, with private access to exhibits.
- **Helicopter ride over Toronto’s skyline:** Get a bird’s-eye view of the CN Tower, Harbourfront and Toronto Islands.
- **Fine dining:** Savor contemporary Canadian cuisine at Alo, ranked among the world’s best restaurants, or indulge in bespoke cocktails at BarChef.

Luxury Touch: A private yacht charter through Toronto Harbour, with Champagne service and city views at sunset.

Day 4-5: Niagara Region – Wine Country and Natural Wonders

How to Get There:

- **Private car transfer** from Toronto to Niagara, or opt for a **helicopter** transfer directly to Niagara-on-the-Lake for a scenic journey.



What to Do:

- **Private winery tours:** Enjoy exclusive tastings at Peller Estates and Two Sisters Vineyards, paired with gourmet meals created by resident chefs.
- **Helicopter tour of Niagara Falls:** Fly above the roaring falls for an unforgettable aerial view, followed by a boat ride on a private charter beneath the mist.
- **Get active:** Spend the morning cycling the back roads of the area or golfing at a local course followed by lunch and an afternoon couples' massage at the luxurious 100 Fountain Spa.
- **Explore Niagara-on-the-Lake:** Stroll through this charming town's upscale boutiques and historic streets, enjoying high tea at the Prince of Wales Hotel.

Luxury touch: A gourmet picnic among the vineyards, complete with fine wine, artisanal cheeses and a dedicated sommelier.

Luxury Highlights Throughout the Journey

- **Private concierge service:** Personalized itinerary adjustments and 24/7 assistance.
- **Seamless private transfers:** Chauffeured vehicles ensure every part of the journey is comfortable and stress-free.
- **Gourmet dining experiences:** Custom menus at award-winning restaurants, private vineyard dinners and curated cocktails.

Using the Research Insights to Appeal to Refined Globetrotters

In summary, if you want to appeal to Canadian Refined Globetrotters, create itineraries that:

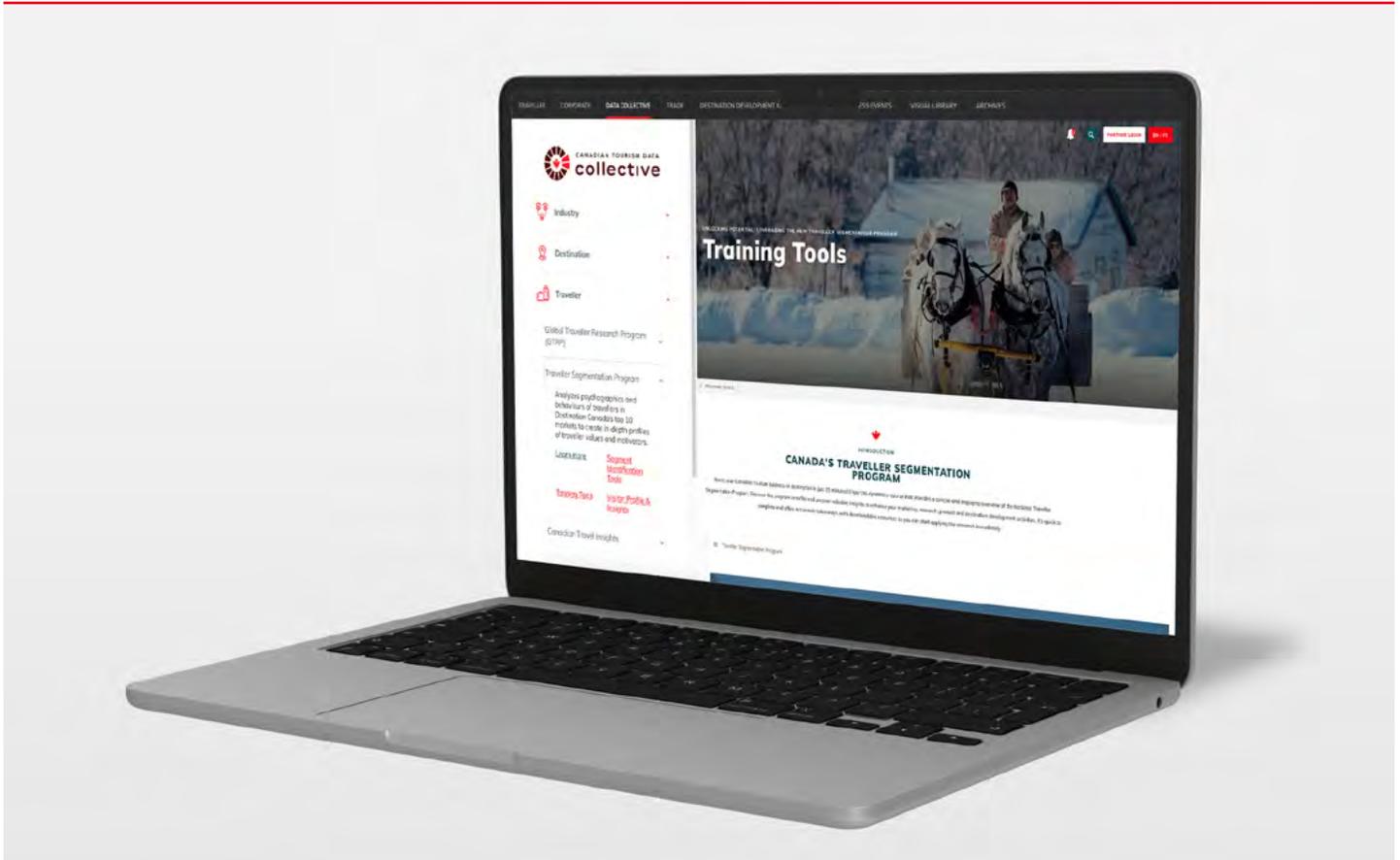
- Allow them to explore and discover – on their own and with guides and local experts.
- Provide opportunities to learn about the history of the area.
- Include activities that immerse them in the culture of the area.
- Provide access to exclusive opportunities.
- Incorporate elements of luxury – where they stay or activities they can do.
- Ensure fantastic dining experiences that offer gourmet cuisine, feature known chefs, etc.
- Offer experiences during the off-season.
- Develop a week-long itinerary suited for a couple (spouse/partner).

Remember, Refined Globetrotters do not always travel as part of an organized group. Given their interest in travelling and the amount they spend on travel, consider developing a direct-to-consumer experience targeting this segment.

To help you, consider talking to:

- Your destination partner at the design stage of development. They likely have information and insights that could help to inform your product to be trade ready and it is generally easier to address their suggestions at the beginning, rather than later in the development process.
- Other operators in your area who are working with travel trade partners to learn about their experience and any insights they can provide. Also, review the operator's offerings to understand the types of experiences that may be interesting to travel trade partners.

In doing so, you may find an opportunity to create something of interest to travel trade partners.



7 NEXT STEPS

Now, it's time to dive in and get started using the research and tools available to you. Destination Canada's research portal has a ton of free information for the tourism industry.

1. Begin by visiting the [Canadian Tourism Data Collective](https://www.tourismdatacollective.ca), where all the general industry and paid partner research is located (type in the URL: <https://www.tourismdatacollective.ca>).
2. Bookmark the site. Click on any category, and you will find a wealth of information to inform decision-making.
3. The Traveller Segmentation program is located in the left-hand dropdown menu within the Traveller section. Here, you can access and download the traveller profiles. Begin by choosing your geographic market of interest, then the traveller segment.
4. Gain access to additional media information and activation tools as a paid partner of Destination Canada. Interested in purchasing this enhanced, paid level of access? To learn more about the fees and benefits of having partner access, e-mail: ctdc-cdtc@destinationcanada.com
5. Discuss with your colleagues how your business or organization could benefit by using the Traveller and Destination Quizzes:
 - Have everyone on your team take the traveller quiz:
www.tourismdatacollective.ca/segmentation/traveller-quiz
 - Complete the destination quiz and discuss the results with your colleagues:
www.tourismdatacollective.ca/segmentation/destination-quiz
 - Gather your team together and discuss the implications for your strategy and tactics based on this new understanding of the traveller types and the Segmentation Program.

-
6. Contact your provincial, regional or destination marketing/management organization to:
 - Learn which traveller types they are prioritizing so that your business/organization can consider the benefits of aligning.
 - Inquire if they will be hosting any training workshops and plan to attend.
 7. Take time to enjoy learning about Canada's new traveller segments. Values-based research, like Census data, doesn't need to be refreshed monthly, quarterly, or annually. Why, you ask? This type of research is designed to uncover deep insights on values, attitudes, and motivations, behavioural drivers that tend to change gradually over time. For example, core values around environmental conservation or community may persist for years. Although they can evolve and may change due to a major global event, they typically fluctuate slowly.

So, what are you waiting for? Visit the [Canadian Tourism Data Collective \(CTDC\)](#) and start using these fantastic resources that are now available to you. Together, let's uncover a world of opportunity!

APPENDIX 1: GLOSSARY

Canada Travel Frequency Index	Indicator of the overall likelihood to have visited Canada in the past 5 years. Indexed against other segments in the market.	
Desired Destination	How a traveller describes the personality of an ideal destination.	
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.

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 originality 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.
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.	
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.	
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.	
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.	
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.
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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 behaviors on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
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APPENDIX 2: VALUES AND ATTITUDES PAIR STATEMENTS

Overall Travel Preferences and Behaviours

Respondents selected the option within the paired statements that best describes them:

1. It's important to me that I visit somewhere that is open to diversity and inclusion (e.g., cultural, ethnic, gender, sexual orientations, etc.)
2. I don't consider diversity and inclusion factors (e.g., cultural, ethnic, gender, sexual orientation, etc.) when choosing travel destinations
3. Hearing from underrepresented communities is an important part of travelling
4. I generally don't go out of my way to seek out perspectives from underrepresented communities when travelling
5. I'm passionate about travelling
6. I travel when I need to
7. I learn the basics of a language before visiting a country/region
8. I generally don't try to learn local languages
9. I seek out destinations where I can explore my ancestral heritage
10. I generally don't seek out destinations in order to explore my ancestral heritage
11. I really want to learn about the history of the destinations I visit
12. I'm more interested in the present and don't focus much on the history of where I visit
13. I enjoy living in the moment while travelling and don't worry much about what comes next
14. I'm a planner, while travelling I like to know what comes next
15. I generally think natural attractions (e.g., mountains, waterfalls) are the highlights of my trip
16. I like natural attractions (e.g., mountains, waterfalls) but I don't usually think they are the highlights of my trip
17. I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling
18. I am mindful of sustainable travel, but will generally not pay more or go out of my way to make eco-friendly choices when travelling
19. It's important for me to know that the money I spend will support the local economy I'm visiting
20. I am mindful of the importance of supporting the local economy I'm visiting, but will generally not go out of my way to buy local

-
21. I consider the impact that I personally have on the destinations I visit
 22. I generally don't think much on the impact that I personally have on the destinations I visit
 23. I love posting my trips on social media to share with friends
 24. I don't see the point of posting about my trips on social media
 25. I like to come back from travels having learnt something new
 26. It's not important to me that I come back from travels having learnt something new
 27. I try to keep a strict budget when I go on holiday
 28. I tend to not think about my budget too much when travelling
 29. Exploring the world through travel is an important milestone of growing up
 30. I don't consider travel to be an important milestone of growing up
 31. I completely disconnect from my work/home life while on holiday
 32. Even while travelling, I like to maintain regular contact with my duties or obligations back home
 33. When I travel to natural environments it makes me reflect on how fortunate I am to experience this
 34. When I travel to natural environments, I enjoy the beauty without reflecting too much on its significance
 35. I'd look for opportunities to hear stories from and engage with the Indigenous people/ original inhabitants of the places I visit
 36. I appreciate diverse cultures, but I would likely not look for opportunities to hear stories from and engage with the Indigenous people/ original inhabitants of the places I visit
-

Values and Attitudes Pair Statements – Preferred Experiences

Respondents selected the option within the paired statements that best describes the experiences they want to have.

-
1. I enjoy joining guided tours to explore new destinations
 2. I enjoy the freedom of exploring new destinations without guided tours
 3. I like my holiday to have some form of physical activity
 4. I generally don't participate in physical activities during my holidays
 5. I'm willing to put in the effort while travelling in order to see lesser-known places
 6. While travelling I generally stick to places that are direct and convenient to get to
-

7. I like to explore places that are off the beaten path and less explored
8. I generally stick to the most popular areas when I visit somewhere
9. I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones when I travel
10. When travelling I often go to familiar restaurants, stores, and hotels that I recognize from home
11. You only ever get to know a country by experiencing its culture
12. You can get to know a country without experiencing its culture
13. Trying out local cuisine is a really important part of travel
14. Local cuisine is not a priority for me; I focus on other aspects of travel
15. I seek out fine dining experiences and gourmet cuisine when I travel
16. I prefer casual dining options and local eateries while travelling
17. Quiet, relaxed experiences are how I take care of myself on vacation
18. I feel best on vacation when being highly active
19. I like to be able to take my time at a historic site or in a museum and not feel rushed
20. I prefer to explore quickly and cover as much ground as possible at historic sites or museums
21. Luxury experiences are an important part of travel
22. I don't generally seek out luxury experiences while travelling

Values and Attitudes Pair Statements – Destination Choice, Planning, Booking

Respondents selected the option within the paired statements that best describes their travel choices.

1. I'm open to unconventional accommodations when travelling
2. I prefer traditional and well-known accommodation options when travelling
3. I'm open to visiting destinations with challenging climates or weather conditions
4. I generally only choose destinations with comfortable climate and weather conditions
5. I'm always on the lookout for new destinations to visit next
6. I generally prefer to go back to the same destinations on holiday
7. I seek out destinations that offer quiet opportunities for deep self-reflection
8. I prefer destinations with lots of distractions and things to do

-
9. I'm open to travelling to destinations with limited tourist infrastructure
 10. I prefer destinations with well-established tourist infrastructure
 11. I seek travel advice from travel agencies and agents
 12. I prefer planning my trips independently and don't consult travel agencies
 13. I prefer booking flights and accommodations well in advance
 14. I like to keep my travel plans flexible and often book on short notice
 15. I am more likely to select destinations and activities that have invested in socially responsible tourism practices
 16. I am not more likely to select destinations and activities that have invested in socially responsible tourism practices
 17. I'd be open to using AI-powered chatbots for travel planning and assistance
 18. I prefer relying on traditional travel resources for planning
 19. Videos and pictures on social media inspire me to travel
 20. I'm not influenced by social media content when it comes to travel
 21. I tend to choose a destination to visit based on value for money
 22. While I think about value for money, it doesn't tend to influence my choice of destination
 23. I go where I want to go, no matter the hurdles
 24. I generally avoid places that are challenging or difficult to reach
 25. When there's a lot of positive buzz about a destination it makes me want to visit it more
 26. Generally I'm not influenced by what destinations are popular or trendy at the moment
 27. When traveling, I expect 24/7 support from a travel provider
 28. When traveling, I do not require 24/7 support from a travel provider
 29. I make sure to visit the "famous" sites wherever I go
 30. I prefer wandering around without a set agenda, even if that means missing some "famous" sites
-

APPENDIX 3: EMOTIONAL TRAVEL MOTIVATIONS

Statement	Associated Emotional Motivation
To just enjoy myself and have fun	Fun
To have a fun, social setting	
To indulge myself and live in the moment	
To bond and create lasting memories through shared experiences	Bonding
To share quality time with others	
To feel connected with new people	Connections
To create new, or take part in old, traditions	Traditions
To escape the demands of everyday life	Escape & Relax
To find much-needed time to relax	
To let loose and forget about day-to-day life	
To feel safe and secure	Secure & Welcome
To feel welcomed	
To be familiar with my surroundings	Familiarity
To feel like a local	
To feel confident of no surprises; I'll get exactly what I expected	Simplicity
To enjoy the simplicity of easy, straight-forward travel	
To feel like I've accomplished something	Accomplishment
To push my limits and challenge myself	
To feel like I'm important	Importance
To feel like a travel expert	Expertise
To have experiences I am proud to tell others about	Adventure
To feel a sense of adventure	
To explore and discover new things and places	Novelty & Authenticity
To have authentic experiences	
To open my mind to new perspectives	

APPENDIX 4: DESTINATION ATTRIBUTES

Destination Personality List

- | | | | |
|------------------|--------------|---------------|-----------------|
| 1. Carefree | 7. Open | 13. Practical | 19. Exclusive |
| 2. Fun | 8. Accepting | 14. Familiar | 20. Luxurious |
| 3. Free-Spirited | 9. Caring | 15. Reliable | 21. World-Class |
| 4. Sociable | 10. Peaceful | 16. Authentic | 22. Unexplored |
| 5. Charming | 11. Relaxed | 17. Trendy | 23. Adventurous |
| 6. Friendly | 12. Safe | 18. Unique | 24. Passionate |

Destination Functional Needs List

- | | |
|---|--|
| 1. Is easy to travel to | 20. Offers a range of scenic viewpoints |
| 2. Doesn't take too long to get there | 21. Has a thriving arts and music scene |
| 3. Good connectivity (Wi-Fi, cell service, etc.) | 22. Offers an energetic and dynamic cultural scene |
| 4. Language is not a barrier | 23. Has a small-town feel |
| 5. Is easy to travel around once there | 24. Is a trendy destination |
| 6. Offers all-inclusive resort packages | 25. Renowned for food and drink experiences |
| 7. Offers natural landscapes in close proximity to city amenities | 26. Provides opportunities to view wildlife in its natural habitat |
| 8. Provides numerous opportunities for outdoor adventures | 27. Provide access to unique natural wonders |
| 9. Offers options for adrenaline seekers | 28. Is kid-friendly |
| 10. Has a variety of museums and/or historical sites | 29. Ideal setting for romantic getaways |
| 11. Has famous attractions | 30. Has packaged holiday/vacation offers |
| 12. Provides a variety of local festivals and events | 31. Is not too expensive |
| 13. Has well-developed tourism infrastructure | 32. Provides a bustling and vibrant city vibe |
| 14. Offers an eccentric and unique atmosphere | 33. Isn't too crowded |
| 15. Has a rich cultural and historical heritage | 34. Provides a sense of personal safety |
| 16. Has vibrant nightlife and entertainment | 35. Is inclusive and tolerant |
| 17. Provides a remote, no-frills experience | 36. Known for stunning natural landscapes |
| 18. Has many hidden gems | 37. Has a mild and pleasant climate |
| 19. Has luxury dining, shopping, and accommodations | 38. Has adequate health standards |

APPENDIX 5: ACCOMMODATIONS

Respondents indicated up to two types of lodging, that represented the majority of their nights as well as the price category of their lodging.

Type of Accommodations

1. Vacation rental (e.g., Airbnb, VRBO)
2. Bed & Breakfast
3. Hostel
4. All-inclusive resort
5. Recreation-based lodge or resort
(e.g., cabins/cottages, ranch, farm, etc.)
6. Campsite
7. Glamping (e.g., camping with comfortable amenities)
8. Unique accommodation
(e.g., ice hotels, treehouses, eco-domes, etc.)
9. Cruise ship
10. Friends or family's place
11. My own home (e.g., vacation home)
12. Other

Price Category

1. Budget
2. Mid-priced
3. Premium
4. High-end/Luxury

APPENDIX 6: DETAILED ACTIVITY LISTINGS

Winter-based Sports

- Ice skating or hockey
- Snowboarding or downhill skiing
- Snowshoeing or cross-country skiing
- Snowmobiling
- Dog-sledding
- Other winter-based sports

Casual Sports

- Ziplining
- Road cycling
- Casual biking
- Fishing
- Hunting
- Golfing
- Other casual sports

High-intensity Sports

- Mountain biking
- Rock climbing
- Whitewater rafting
- Bungee jumping or skydiving
- Other high-intensity sports

Water-based Sports

- Kayaking, canoeing, or paddle-boarding
- Scuba diving or snorkeling
- Surfing
- Waterskiing, wake surfing or wakeboarding
- Sailing or boating
- Swimming
- White-water rafting
- Other water-based sports

Festivals and Events

- Live theatre
- Winter festivals
- Sporting events
- Cultural or traditional festivals
- Fairs or rodeos
- Music concerts or festivals
- Comedy festivals
- Other festivals and events

Cultural Experiences or Attractions

- Museums
- Art galleries
- Observing architecture
- Visiting local monuments
- Religious buildings or sites
- Language lessons
- History or culture lessons
- Indigenous experiences (e.g., ceremonies, community visit, attractions)
- Immersive cultural experiences (e.g., performances, attractions)
- Historical or archeological sites
- Other cultural experiences or attractions

Shopping

- Luxury shopping
- Visiting famous shopping centres or areas
- Souvenir shopping
- Outdoor markets
- Other shopping activities

Local Cuisine

- Wineries
- Breweries
- Cafes or bakeries
- Local restaurants
- Cooking lessons
- Luxury dining
- Street cuisine
- Other food and dining activities

Nightlife

- Bars and pubs
- Clubs and dancing
- Casinos
- Other nightlife activities

Nature Experiences

- Viewing wildlife in natural habitat
- Visiting nature parks or preserves
- Northern lights
- See or explore mountains
- See or explore lakes, rivers, or waterfalls
- Explore wilderness or backcountry
- Fall colours
- Spring blossoms
- Camping
- Hiking
- Nature walks
- Birdwatching
- Visit city parks or gardens
- Lakeside beaches
- Oceanside beaches
- Other nature experience

Health and Wellness

- Spas
- Volunteering
- Meditation or yoga
- Sauna or steam bath
- Outdoor hot tub or bath
- Other health and wellness activities

Family-focused Attractions

- Amusement parks or theme parks
- Zoos or aquariums
- Space or science centres
- Other family-focused attractions

Guided Tours

- Helicopter or float plane tours
- Wildlife or nature tours (e.g., whale watching, safaris)
- Food tours
- Boat tours
- Agricultural or farm tours
- City tours
- Other guided tours

Overnight Experiences

- Renting a RV
- Staying at all-inclusive resort
- Staying at resort or cabin in nature
- Staying at bed & breakfast
- Train trip
- Cruise
- Other overnight experiences

APPENDIX 7: DESTINATION TYPE

Destination Types List Plus descriptions as provided in the questionnaire

- 1. Urban centres:** cities and bustling metropolises known for their culture, shopping, and entertainment.
- 2. Urban Countryside and villages:** quaint rural areas, agricultural landscapes, and charming villages offering a peaceful retreat.
- 3. Suburban experiences:** tranquil suburban areas ideal for exploring lesser-known local gems such as parks and dining.
- 4. Small cities and towns:** charming small cities and towns known for their quaint atmosphere, historic sites, local festivals, and community events, offering a cozy and intimate travel experience.
- 5. Beach resorts:** coastal areas with sandy beaches, water sports, and relaxation opportunities.
- 6. Luxury resorts:** exclusive and high-end resorts known for lavish amenities, spa treatments, and personalized services.
- 7. Mountain retreats:** scenic mountainous regions, ideal for hiking, skiing, and enjoying natural beauty.
- 8. Island getaways:** tropical or remote islands offering seclusion, pristine beaches, and unique local culture.
- 9. Adventure destinations:** locations known for adventurous activities such as trekking, rafting, or rock climbing.
- 10. Eco-tourism spots:** environmentally conscious destinations with a focus on nature conservation and sustainable tourism.
- 11. Wildlife and nature reserves:** areas abundant in wildlife, flora, and fauna, ideal for nature enthusiasts and safaris.
- 12. Arctic adventures and northern lights:** destinations that feature arctic experiences such as Northern Lights, exploring ice caves, and enjoying winter activities like dog sledding and ice fishing.
- 13. Arts and Culture Hub:** destinations with a focus on local traditions, arts, music, and culinary experiences.
- 14. Food and wine capitals:** cities or regions renowned for their culinary delights and vineyard tours.
- 15. Historical sites:** destinations rich in historical and cultural heritage, including ancient ruins and monuments.

APPENDIX 8: LIFE OUTSIDE TRAVEL

Major Life Events

- | | | |
|-----------------------------|---|-------------------------|
| 1. Travelled for leisure | 6. Purchased a boat | 10. Moved to a new city |
| 2. Purchased a new car | 7. Had a child starting school | 11. Retired |
| 3. Bought a new home | 8. Hired a lawyer | |
| 4. Had your house renovated | 9. Started a new job or changed careers | |
| 5. Had a child | | |

Non-essential Spending Priorities

- | | | |
|--|----------------------------|-------------------------------|
| 1. Travel | 4. Fashion and accessories | 9. Personal care and wellness |
| 2. Experiences
(e.g., concerts, events). | 5. Technology and gadgets | 10. Other |
| 3. Personal hobbies and interests
(e.g., sports equipment, books,
art supplies). | 6. Home and decor | |
| | 7. Giving back and charity | |
| | 8. Savings and investments | |

APPENDIX 9: HOW WE PLAN

Info Source for Planning

1. Official tourism websites for the destination
2. Travel review sites (e.g., TripAdvisor)
3. Travel booking sites/apps (e.g., Expedia, Booking.com, Travelocity)
4. Travel provider websites (e.g., hotels, airlines)
5. Travel guidebooks or travel guide websites
6. Accommodation sharing service sites (e.g., Airbnb, VRBO)
7. Blogs
8. Social media (e.g., Facebook, TikTok, Instagram)
9. Travel itinerary planning apps (e.g., TripIt, Wanderlog)
10. Online videos (e.g., YouTube)
11. Films or TV shows featuring the destination
12. Travel influencers
13. Travel agents/Travel advisors
14. Magazines or newspaper articles
15. Podcasts
16. Consumer tradeshow
17. Recommendations from friends or family
18. AI technology (e.g., chatbot tools)
19. Other

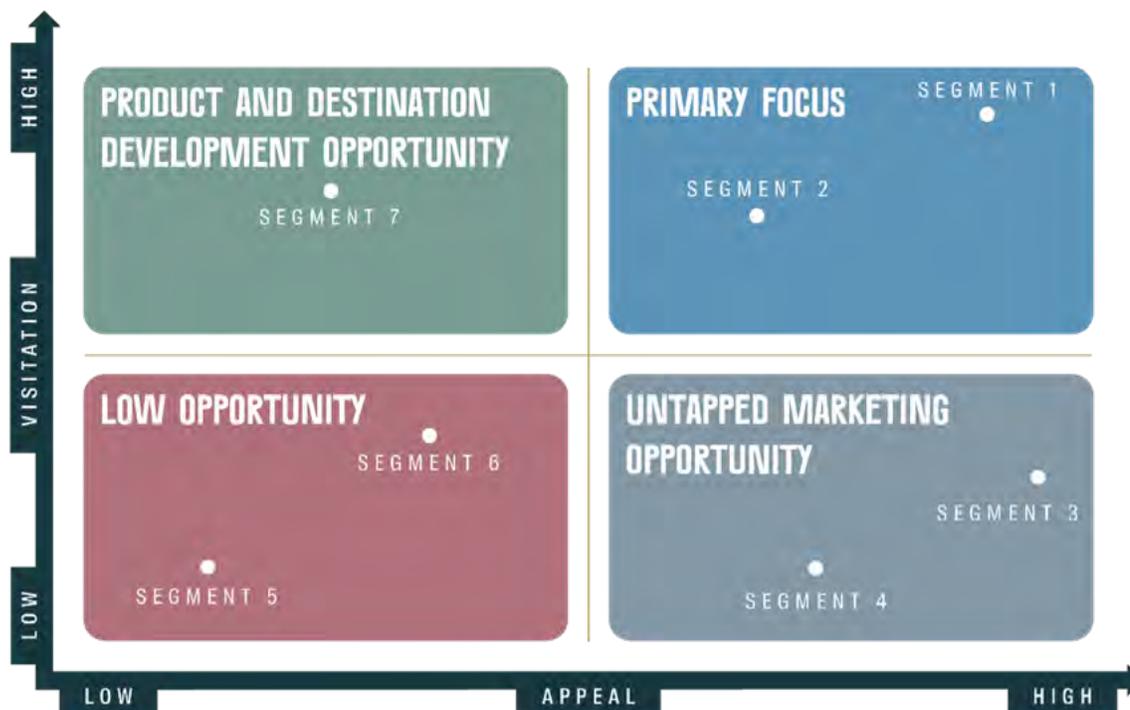
Channels for Booking (Transportation, Accommodations and Activities)

1. Travel booking sites/apps (e.g., Expedia, Travelocity, Airbnb, VRBO, Booking.com)
2. Direct with company (e.g., direct with hotel or airline)
3. Through a travel agent/ travel advisor
4. Through a tour operator
5. Will be booked by someone else in the travel group
6. Other

APPENDIX 10: TRAVELLER VISITATION VS. DESTINATION APPEAL

Pulling together insights from the Traveller Quiz and Destination Quiz to reveal areas of opportunity can be addressed conceptually through an opportunity matrix that identifies areas of focus and opportunity based on high and low levels of visitation and appeal.

- **High visitation and high appeal** – an area of primary focus for marketing, product/experience and destination development.
- **High visitation and low appeal** – an area with product/experience and destination development opportunities.
- **Low visitation and high appeal** – an area with an untapped marketing opportunity.
- **Low visitation and low appeal** – an area with a low priority for growing your business/destination.



Primary Focus

Segments in this quadrant visit frequently and find the destination highly appealing, making it a focus for marketing and development investment.

Product and Destination Development Opportunity

Segments in this quadrant have a high level of visitation, but the destination appeal is low. This offers opportunities for product/experience and/or destination development to increase the products, services and experiences that meet the needs of the traveller segments in this quadrant.

Untapped Marketing Opportunity

Segments in this quadrant have a low level of visitation but find the destination highly appealing, suggesting there is untapped opportunity. Since their preferences align well with the destination's offers, increasing marketing efforts could help move them into the primary focus quadrant.

Low Opportunity

Segments in this quadrant have low visitation and destination appeal levels. Therefore, these are not the traveller types on which to focus marketing or product/experience development efforts.

Other Considerations

The profiles contain other data points that can be helpful considerations in investing in a specific traveller segment that does not lie in the primary focus quadrant:

- If the segment is a priority segment for Destination Canada.
- Market share and size of the traveller type in your primary target markets (pg. 3 and 4 of the market profile).
- Their thoughts on responsible travel.
- When they prefer to travel.
- Their likelihood of being the key decision-maker in their travel group.
- Where they have visited in Canada and where they would like to visit.
- Their passport ownership.

Additionally, the other visitation data sources discussed in 3.1.4 may provide useful insights.

APPENDIX 11: ANSWER KEY – CHOOSING IMAGERY

Here are the correct responses to the activity in section 5.3.



Outdoor Explorers

Outdoors, in nature, physically active, sense of adventure, small group.



Purpose Driven Families

Friends/family group, sharing time/ bonding, relaxed setting in nature



Neither

Guided tour not strong for either; cultural attractions low for Outdoor Explorers and average for Purpose Driven Families.



Neither

Neither are strong for nightlife, party atmosphere.



Outdoor Explorers

Fishing is a highly appealing activity. Out in nature, not crowded, personal accomplishment.



Purpose Driven Families

Canoeing is a highly appealing activity. Looks like a safe river for a family to explore. (Outdoor Explorers like paddling though river not adventurous enough for them)..



Neither

Age group does not suit either and cost of the experience is likely higher than either want.



Purpose Driven Families

Oceanside beach in nature, shared experience.



Outdoor Explorers

Sense of adventure, exploring stunning landscapes off the beaten path, on their own, can stop and hike, likely camping.

APPENDIX 12: ANSWER KEY – WRITING COPY

Writing copy activity found in Section 4.4

Both these experiences speak to being in the outdoors. However, there is a real difference in how the experiences are positioned. Copy A focuses on adventure, learning, challenge and pushing one’s limits. In contrast, Copy B presents a more relaxed, less adrenaline-inducing approach to being in the outdoors by focusing on activities done together, family bonding and even a little luxury. Each description attracts a different traveller based on the motivations addressed.

Copy A: Forge New Paths. Embrace the Adventure.

Values and Motivations Addressed

Forge New Paths. Embrace the Adventure	Novel, new, adventure
Discover the thrill of the unknown with Canada’s endless landscapes waiting to be explored.	Adventure, natural environment, stunning landscapes, exploration
From unconventional trails to fresh, off-the-beaten-path experiences, every journey offers a chance to push boundaries and redefine adventure.	Unexplored, learning, challenge, authentic
Embrace the challenge, explore the unexplored and dive into outdoor activities that connect you with nature in unexpected ways.	Push limits, adventure, physical activity, connection to nature
Whether trailblazing through dense forests or uncovering hidden gems, Canada invites you to move beyond the ordinary and experience the extraordinary.	Nature, unknown/less-visited locations, novel and unique
Best fit for:	Outdoor Explorers

Copy B: Connect. Explore. Belong.

Values and Motivations Addressed

Explore, Connect and Create Memories.	Exploration, connection, bonding
Experience meaningful moments with your loved ones, where every adventure brings you closer.	Bonding, family, connection
Whether bonding over shared experiences and ancestral stories or exploring Canada’s natural wonders, each experience becomes part of your family’s story.	Shared experiences, family roots, out in nature, creating new memories
Stay in cozy lodges or scenic retreats that offer comfort without distraction, letting you focus on what matters most—being together while allowing you to stay in touch with the office.	Luxury, bonding, addressing duties “back home”
From guided nature walks with Indigenous guides to swimming at the beach, discover new ways to connect, recharge and make memories that last a lifetime.	Nature, indigenous activities, water-based activities, shared memories
In Canada, every journey is a chance to grow closer, explore deeper and create traditions for the future.	Family bonding
Best fit for:	Purpose Driven Families

APPENDIX 13: ANSWER KEY – WORKING WITH THE TRAVEL TRADE

Section 6.3 Working with the Travel Trade

- **Green highlights** indicate things that appeal to Canadian Refined Globetrotters (indexes >115).
- **Yellow highlights** indicate things that are less appealing to Canadian Refined Globetrotters (average or low indexes).
- Refer to the notes at the end to see why these things have a strong appeal or not.

“The Ultimate Canadian Escape: Toronto and Niagara“

Duration: 5-7 days.

Mode of Travel: Private transfers, luxury train and scenic helicopter rides..

Accommodation: Iconic five-star hotels and boutique resorts.

Day 1-3: Toronto – The Heart of Urban Elegance

What to Do:

- **Shopping experience in Yorkville:** Explore high-end boutiques like Chanel and Hermès, with a personal shopper to curate your purchases.
- **Exclusive tour of the Art Gallery of Ontario:** Enjoy a behind-the-scenes tour of Canadian and Indigenous art collections, with private access to exhibits.
- **Helicopter ride over Toronto’s skyline:** Get a bird’s-eye view of the CN Tower, Harbourfront and Toronto Islands.
- **Fine dining:** Savor contemporary Canadian cuisine at Alo, ranked among the world’s best restaurants, or indulge in bespoke cocktails at BarChef..

Luxury Touch: A private yacht charter through Toronto Harbour, with Champagne service and city views at sunset.

Day 4-5: Niagara Region – Wine Country and Natural Wonders

How to Get There:

- **Private car** transfer from Toronto to Niagara, or opt for a helicopter transfer directly to Niagara-on-the-Lake for a scenic journey.

What to Do:

- **Private winery tours:** Enjoy exclusive tastings at Peller Estates and Two Sisters Vineyards, paired with gourmet meals created by resident chefs.
- **Helicopter tour of Niagara Falls:** Fly above the roaring falls for an unforgettable aerial view, followed by a boat ride on a private charter beneath the mist.
- **Get active:** Spend the morning cycling the back roads of the area or golfing at a local course followed by lunch and an afternoon couples’ massage at the luxurious 100 Fountain Spa.
- **Explore Niagara-on-the-Lake:** Stroll through this charming town’s upscale boutiques and historic streets, enjoying high tea at the Prince of Wales Hotel.

Luxury touch: A gourmet picnic among the vineyards, complete with fine wine, artisanal cheeses and a dedicated sommelier.

Luxury Highlights Throughout the Journey

- **Private concierge service:** Personalized itinerary adjustments and 24/7 assistance.
- **Seamless private transfers:** Chauffeured vehicles ensure every part of the journey is comfortable and stress-free.
- **Gourmet dining experiences:** Custom menus at award-winning restaurants, private vineyard dinners and curated cocktails.

Descriptors of the experience that hold a strong appeal:

- **Exclusive/private access/concierge service** – everything is looked after, easy, stress free.
- **Transport** – private car and driver or helicopter.
- **Gallery tour** – enjoy art galleries and museums and incorporating a behind-the-scenes private tour increases the appeal.
- **Unique experiences** – helicopter ride over Toronto skyline and Niagara Falls.
- **Fine dining** – gourmet, custom menus, worlds best restaurants.
- **Activities** – spa activities.
- **Luxury** – lots of special touches.

Descriptors of the experience that hold an average or weak appeal:

- **Shopping** – this activity holds only an average appeal (index 101) for Refined Globetrotters with only 38% of the segment indicating it is something they want to do. While the location in Yorkville, a high-end shopping area would be appealing, making it a private shopping experience would increase the overall appeal.
- **Get active** – Cycling and golf are categorized as “casual sports” which are not activities Refined Globetrotters look to do on a vacation (score 11%, index 66), so it would be better not to incorporate these activities.
- **Stroll through Niagara-on-the-Lake** – time for strolling the town on their own is fine but no need to highlight upscale boutiques for this group. History and culture are stronger draws so a guided historical walk would have a stronger appeal (guided city tours index at 147 and learning about the history of a destination).