

EQ[®] Profiles

Use the CTC's rich social values-based market research to enhance your customer targeting, product development and marketing efforts.

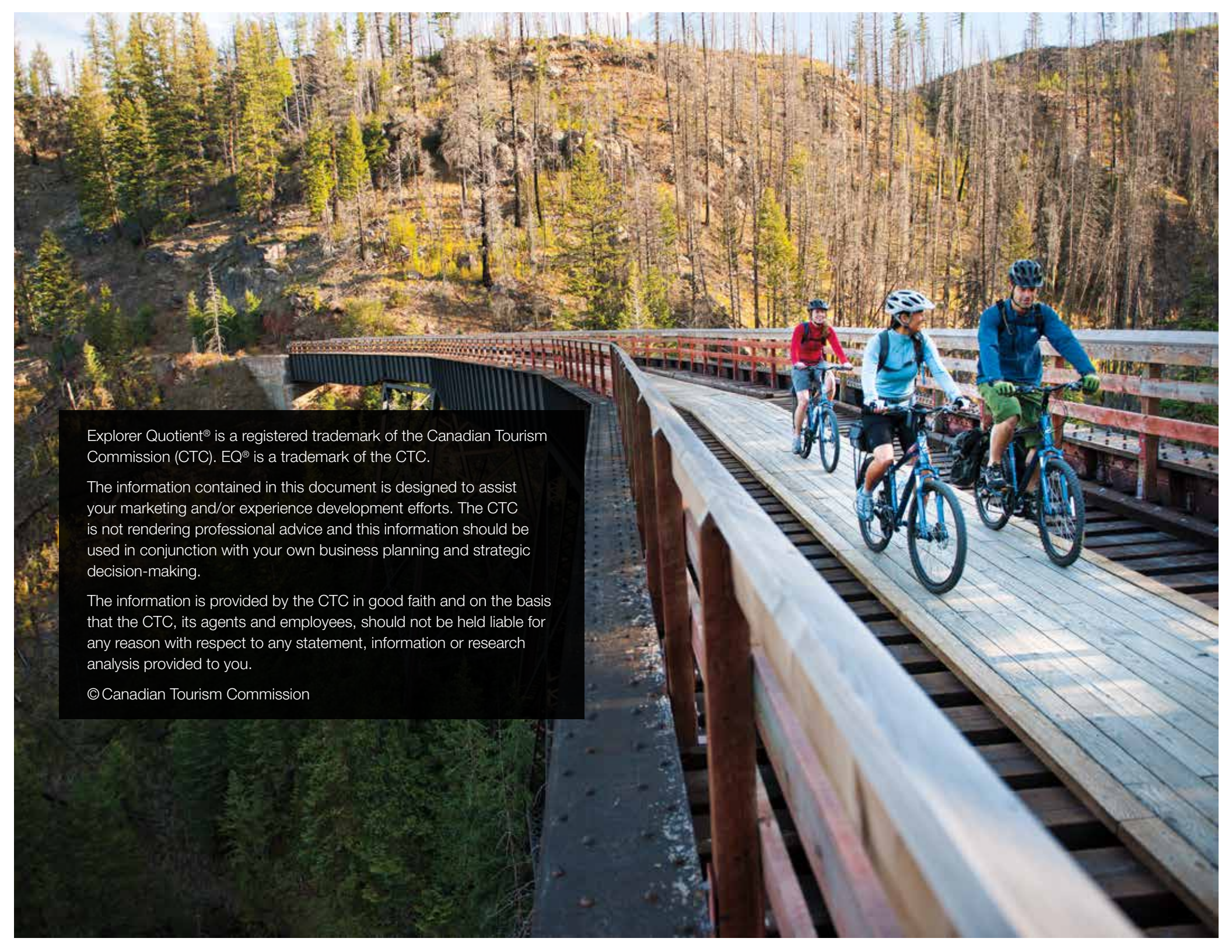
See inside for easy-to-read profiles of the CTC's target Global EQ types:

- Free Spirits
- Cultural Explorers
- Authentic Experiencers

Also includes EQ data for 10 individual markets*

** Mexico and China sections updated in 2015*



A photograph showing three cyclists riding a long wooden bridge over a valley. The bridge has a wooden deck and a metal railing. The background is a forested hillside with some trees showing autumn colors. The cyclists are wearing helmets and colorful gear. The bridge curves to the left in the distance.

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The information contained in this document is designed to assist your marketing and/or experience development efforts. The CTC is not rendering professional advice and this information should be used in conjunction with your own business planning and strategic decision-making.

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Welcome to the Explorer Quotient® Profiles.

Let's bring EQ® home to your business.

You know how important it is to get maximum return out of your marketing and sales efforts. You might also know that the most competitive destinations and businesses are the ones that understand who their best customers are, what these customers want to buy and how best to communicate with them to make sure their message resonates. This kind of market research is expensive and is typically used by large companies and destination marketing organizations; they know it is money well spent, because what they learn allows them to build marketing campaigns that generate strong results.

Now, thanks to the Canadian Tourism Commission (CTC), you have access to FREE, award-winning research that will give you deep customer knowledge plus the tools to help you build more targeted marketing campaigns. If you're looking to get more out of every marketing dollar you spend and to enjoy a marketing advantage, we can help!

This document introduces the Explorer Quotient® (EQ®), the CTC's proprietary market segmentation research specifically created to align Canada's tourism industry with collective product development and marketing know-how. Working together, our aim is to use this sophisticated tool to attract international visitors to Canada. Within these pages you'll learn:

- What is EQ?
- What are the EQ Profiles?
- Applying EQ to your business: Assessing your target EQ types

Dive in to get started.

Table of Contents:

Introduction:	2	<i>Germany</i>	45
What is EQ?	4	Free Spirits 12%	
What are the EQ Profiles?	5	Cultural Explorers 17%	
Applying EQ: Assessing your target EQ types	6	Authentic Experiencers 13%	
Additional resources	8	<i>UK</i>	51
EQ Profiles:		Free Spirits 13%	
Section One: Global EQ Profiles (2012)	9	Cultural Explorers 10%	
Free Spirits 13%		Authentic Experiencers 16%	
Cultural Explorers 12%		<i>USA</i>	57
Authentic Experiencers 9%		Free Spirits 14%	
Section Two: Country-specific EQ Profiles		Cultural Explorers 9%	
<i>2012 Series: Core Markets</i>		Authentic Experiencers 11%	
<i>Australia</i>	17	<i>2015 Series: Emerging & Transition Markets</i>	
Free Spirits 16%		<i>Mexico</i>	63
Cultural Explorers 15%		Free Spirits 15%	
No-Hassle Travellers 11%		Cultural History Buffs 10%	
Social Samplers 14%		Authentic Experiencers 11%	
<i>Canada</i>	25	<i>China</i>	69
Free Spirits 12%		Free Spirits 17%	
Cultural Explorers 9%		Cultural Explorers 8%	
Authentic Experiencers 12%		Aspiring Escapists 20%	
Personal History Explorers 13%		<i>2009 Series: Emerging & Transition Markets</i>	
No Hassle Travellers 10%		<i>Japan</i>	75
Rejuvenators 5%		<i>South Korea</i>	81
Gentle Explorers 25%		Section Three: Glossaries	
<i>France</i>	39	Social Values Glossary	87
Free Spirits 8%		Travel Values Glossary	91
Cultural Explorers 14%			
Cultural History Buffs 12%			

So, what is EQ?

As Canada's national tourism marketing organization, it's the CTC's job to know everything we can about your most valuable travellers. To do that, we've gone beyond traditional market research to find out exactly why different types of people seek out entirely different types of travel experiences. The result is the Explorer Quotient® (or EQ®). This tool has the power to change the way that travel experiences are developed, marketed and sold. We've now developed EQ Profiles to help small- and medium-size businesses (SMEs) focus product development, marketing and sales efforts on their "best" customers.

EQ – in a Nutshell.

Market analysis is an important first step when developing any marketing plan. Market segmentation is a marketing analysis technique that allows businesses to group customers into "segments" based on given criteria such as demographics, geography or even psychological factors (attitudes, beliefs and values). This approach allows tourism businesses to identify and understand those segments that are most likely to buy their products, to then better align their marketing and product development efforts accordingly.

Put simply, EQ is a market segmentation system based on the science of psychographics. Environics Research Group, a globally respected player in social values and consumer research, developed EQ for the CTC, to apply sophisticated, values-based segmentation specifically for the travel market. Psychographics is an evolution of the traditional field of demographics. Instead of just breaking travellers into groups based on age, income, gender, family status or education level—all of which is useful information—psychographics looks deeper at people's social values and views of the world.

EQ breaks each geographic market down into different psychographic groups, called Explorer Types. Each type is identified by particular characteristics stemming from social and travel values, travel motivations and behaviours. The CTC selected Canada's best Explorer Type prospects based on their affinity for the *Canada. Keep Exploring* brand, as well as love of travel, potential for being high-yield customers and propensity for word-of-mouth advocacy. This resulted in the selection of target types in each of the CTC's primary geographic markets.

At the CTC, we use EQ to power our own global marketing, sales and media relations campaigns. We believe Canada's international competitiveness as a travel destination hinges on tourism businesses and destination marketers across the country working together, using EQ to target the right customer, with the right offer and the right message. We hope you'll join the many tourism businesses and destination marketers across the country who share this belief and are dedicated to making sure Canada earns more than its share of the international travel market.

What are the EQ Profiles?

The EQ Profiles have been designed as quick reference guides to assist you in making choices about which Explorer Types best suit your business and product mix. The profiles can help you to effectively plan future product development and marketing.

Section One's *Global EQ profiles* describe the CTC's most desirable EQ targets as found in a number of its international markets. These are: *Free Spirits*, *Cultural Explorers* and *Authentic Experiencers*. This section is for operators who want to create marketing and visitor experience strategies based on one or more of these EQ types, regardless of their geographic market of origin. For businesses that want to further explore these EQ types within their targeted geographic markets (in the sections that follow), this section is a useful way to become familiar with these EQ types on a broad, global basis before diving into their country-specific context.

Note: The Global profiles reflect the refreshed EQ research undertaken in 2010-11 for the following countries: Canada, USA, UK, France, Germany and Australia.

Section Two's *Country-specific EQ* profiles are grouped country by country for each of CTC's primary geographic markets. Each country section contains the EQ types that the CTC has targeted for that country, and offer country-specific research. These will be useful for operators who wish to target specific country markets and apply EQ within that context.

As with the global EQ profiles, each of the country-specific profiles contains a snapshot of each EQ type's demographics, its social and travel values, typical travel behaviours and the specific activities they most like to engage in, last-trip data, trip-planning sources, plus tips on how you might enhance your experience offer and marketing strategies for this EQ type.

The set of profiles for the following countries: Canada, USA, UK, France, Germany and Australia are based on the refreshed EQ research undertaken in 2010-11. Profiles for China and Mexico are based on research undertaken in 2012-13. The remaining markets (Japan, and South Korea) have yet to be updated; thus their current format is slightly different from the others.

Section Three contains the *Social Values and Travel Values Glossaries*, quick reference guides to the definition of each of the values listed within the profiles.

Ready to apply EQ to your business? Let's assess your target EQ types

Time to get started. You already know a lot about your customers, so let's start there.

Step 1: To determine who your best EQ prospects are, ask yourself some questions about your current clientele:

- *What are the age range, income level and educational level of your best customers?*
- *What activities do they like to do most when they visit your business?*
- *How do they like to get around when they are in the area? Who do they travel with?*
- *What gets mentioned when they talk about your product on social media? Are there key words that keep popping up?*

Once you have determined the above, go to Section One and read over the profiles describing the three EQ Global Types. If you recognize your customers in one or more of the types, that's great news!

Step 2: If you did not recognize your best customer in one of the three global EQ types, you may want to examine the country-specific profiles in Section Two.

Try this simple method to identify your target Explorer Types in specific countries:

1. Go to the profiles for the countries from where you are currently drawing customers and review the Explorer Types.
2. Use the chart below to write the name of those Explorer Types you think are currently visiting your experience next to your primary country markets.
3. Next, think about the future. Which Explorer Types do you think have potential to buy your experience in the next five years? Circle your best prospects from your list of current EQ types. Then, based on your review of the country-specific EQ types (and knowledge gained by studying the global types) add in any prospective EQ types that could be customers in the future. Use a different colour of ink for these future Explorer Types so you can see at a glance who is your customer today and who could be your customer tomorrow.
4. Once you have determined your target EQ types, go to the profiles that apply to those types. Study them for the wealth of knowledge and marketing tips within to help you improve your experience's positioning to meet the needs and expectations of your target types.

Assessing EQ Targets: worksheet

	Explorer Types (current and/or potential):			
Canada				
USA				
UK				
France				
Germany				
Australia				
Mexico				
China				
Japan				
South Korea				

Additional resources:

Well done! Ready for more?

Now that you've zeroed in on your best Explorers, you'll want to review the CTC's additional tools that will complement your EQ learning journey. You will find them in the Resources section of the CTC's corporate website at <http://en-corporate.canada.travel/resources-industry/tools> or by contacting the CTC at EQ@canada.travel.

- The online *EQ Toolkit* is a seven part toolkit that will help you use EQ in various areas of your business including product development and marketing.
- The CTC's *Experiences Toolkit* will help you build outstanding experiences that attract high-yield customers who love to explore and learn.
- Our experiential tourism training videos showcase examples of how small businesses in the Atlantic provinces have developed experiences for travellers and provide insights into how experiential tourism can be applied in real situations.
- The CTC *Brand Toolkit* provides tips on how you can align your voice, values and mission with CTC's award-winning brand.
- The CTC's Brand Library contains high-quality, rights-free images and video for use by our partners from coast to coast to coast. Register for your free account at <http://www.photovideo.canada.travel/>
- The Canadian Signature Experience collection web page provides you with background information on this innovative program and instructions on how to apply.



Global EQ Profiles (2012)

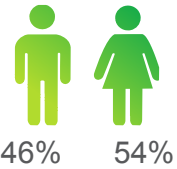
- Free Spirits
- Cultural Explorers
- Authentic Experiencers

Free Spirits

13% of the Global Market



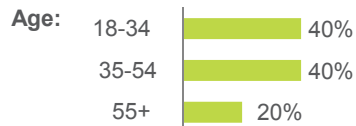
Demographics



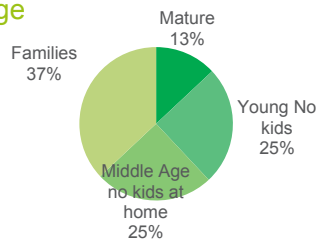
Education: Average

Employment: FT; above avg. % are students

Household Income: Higher than average



Lifestage



Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others.

Personality traits: Extroverted, driven, open, fun-loving, adventurous

Social Values

Top defining Values

Joy of Consumption: Free Spirits find shopping highly gratifying. A brand name on a product or service is an indicator of quality, style and status.

Social Mobility: Possessing the skills and education to make it happen, Free Spirits are highly motivated to advance in life and work.

Attraction for Crowds: Free Spirits are one of the most social of all EQ types. Adept at networking, they enjoy large group atmospheres (as well as one-on-one conversations). Interacting with others gives them the chance to learn about themselves.

Penchant for Risk: They are confident risk-takers, secure in their ability to reach their goals no matter what obstacles they may face.

Happiness: Free Spirits consider themselves happy and full of vitality for life.

Need for Status Recognition: They want to show their success off to the world.

Bottom defining Values

Buying on Impulse: They love to shop but they are not impulsive - they'll shop around to get exactly what they're looking for.

Skepticism Towards Advertising: Free Spirits have confidence in advertising and will entrust professionals to help them with major purchases or planning.

Aversion to Complexity: Free Spirits have a zest for life and are not intimidated by changes or complexities in society. Being spontaneous is thrilling and fun for them.

Travel Values

The Free Spirit is the traveller's traveller...they seem to love everything about travel and as in life, they embrace the experiences it offers with arms wide open.

A Free Spirit will seek:

Constant Comparison Travel: Love to travel – and brag about the superiority of the places they have visited

Luxury: Often aspire to stay in the most luxurious accommodations and venues.

Hedonistic Rejuvenation: Vacation is a time to be carefree and indulge – they will enjoy spa, nightlife and great cuisine and other opportunities for a little pampering.

Checklist Samplers: Want to see all the main attractions, but not in depth – they will employ detailed itineraries, ensuring that they don't miss anything !

Shared Experiences: Attracted to groups where they can socialize and share the experience with others – using social media for sharing during and after the trip.

A Free Spirit will avoid:

Comfort-Seeking: Free Spirits have a higher penchant for risk, so they are not afraid to try something new or have an adventure

Reluctant travel: Not content to experience the world through the Internet or TV.

Experience Appeal

Following their energized approach to life and their enthusiasm for travel, Free Spirits are more likely to find many activities appealing to do on a long-haul vacation that most other types.

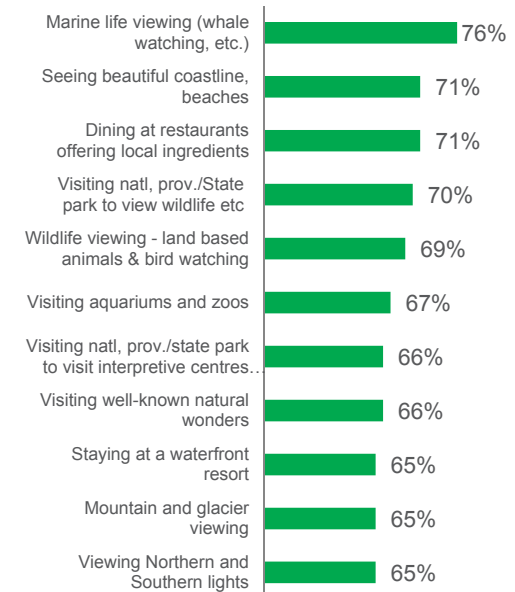
Free Spirits are more likely than other travellers to be interested in:

1. Shopping, Dining and Other Food-related Activities
2. Entertainment, Performing Arts and Amusement Parks
3. Accommodation-related Activities
4. Water-based Outdoor Activities
5. Festivals, Events & Spectator Sports
6. Outdoor/Nature Sports & Activities
7. Winter Outdoor Activities

Free Spirits are also interested in:

1. Nature Observation Activities
2. Exhibits, Architecture, Historic Sites/Buildings, Museums
3. Sightseeing Activities
4. Cruises & Touring
5. Hands-on Learning Activities

Top 10 Most Appealing Activities Among Free Spirits:

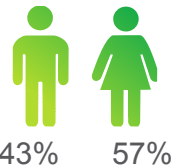


Cultural Explorers

12% of the Global Market



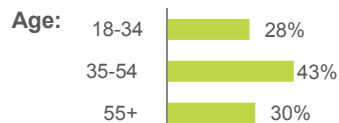
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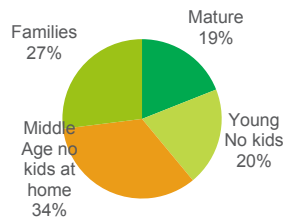
Education: Higher than average

Employment: FT, lower than avg.
% are retirees

Household Income: Average



Lifestage



© 2012 Canadian Tourism Commission

Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Personality traits: Open, accepting, non-traditional, enthusiastic, creative

Social Values

Top defining Values

Importance of Spontaneity: They enjoy an element of surprise and welcome unexpected circumstances that enrich their lives.

Cultural Sampling: They believe that other cultures have a lot to teach them.

Adaptability to Complexity: They are not threatened by the changes and complexities of society. In fact, they embrace complexity as a learning experience and a source of opportunity.

Pursuit of Novelty: Trying out new things is thrilling!

Personal Control: They feel in control of their lives and not afraid to take on moderate risk if it means they can learn something new.

Personal Escape: They long for that which is beyond the practical and they want to be transported from their everyday life.

Personal Challenge: They set difficult personal goals for themselves at work and at play and will finish what they start.

Bottom defining Values

Confidence in Big Business: Their tendency to reject authority leads them to question those in leadership positions, including big businesses which they do not believe have better quality simply because they are larger/better known.

Conformity to Norms: They like to be unique, different from others and love to share their ideas and creativity.

Ostentatious Consumption: They are not highly materialistic and are offended by ostentatious consumption.

Travel Values

The Cultural Explorer is an avid traveller who values learning and discovery while travelling. They don't want to feel like a "tourist," preferring just to blend in and have the most authentic experience possible rather than being confined to group tours and schedules.

A Cultural Explorer will seek:

Constant Travel: Always excited about the next trip.

Living History/Culture: Love to learn about and absorb themselves in the ancient history, as well as the modern cultures of the places they visit.

The Beauty of Nature: Will choose destinations that provide opportunities to experience natural beauty.

Fun, Shared Experiences: Travel is a journey, not the destination, and is best experienced with like-minded companions who like to have fun while learning.

Going with the Flow: Prefer a free and spontaneous approach to seeing the sights.

A Cultural Explorer will avoid:

Luxury/Comfort-seeking: This EQ type seeks an authentic experience and doesn't need to be pampered in commercial hotels and have experiences just like home.

Group/Checklist Travel: Prefer not to be constrained to "tourist" schedules or destinations, and will chart their own courses..

Experience Appeal

Like their Free Spirit counterparts, Cultural Explorers are more likely to find many activities appealing to do on a long-haul vacation.

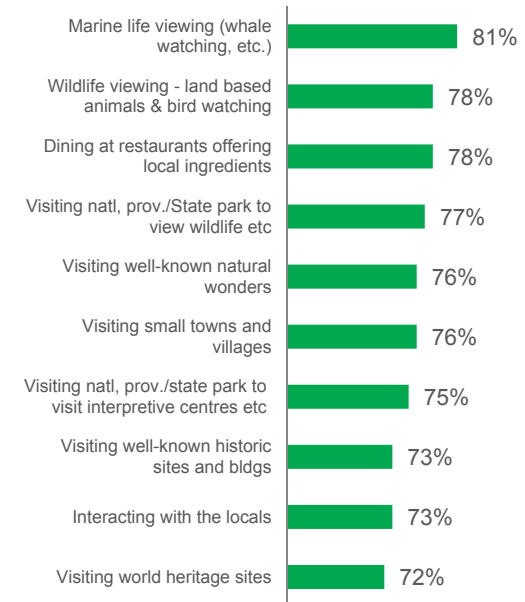
Cultural Explorers are more likely than other travellers to be interested in:

1. Nature Observation Activities
2. Exhibits, Architecture, Historic Sites/Buildings, Museums
3. Sightseeing Activities
4. Accommodation-related Activities
5. Water-based Outdoor Activities
6. Hands-on Learning Activities
7. Festivals, Events & Spectator Sports
8. Outdoor/Nature Sports & Activities
9. Winter Outdoor Activities

Cultural Explorers are also interested in:

1. Shopping, Dining and Other Food-related Activities
2. Entertainment, Performing Arts and Amusement Parks
3. Cruises & Touring

Top 10 Most Appealing Activities Among Cultural Explorers:

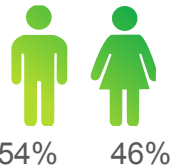


Authentic Experiencers

9% of the Global Market



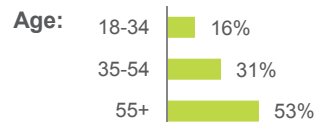
Demographics



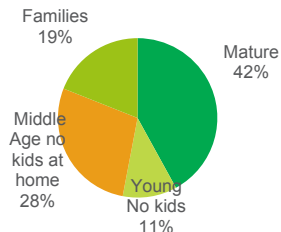
Education: Higher than average

Employment: FT – more likely than avg to be retired

Household Income: Average



Lifestage



© 2012 Canadian Tourism Commission

Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

Personality traits: Steadfast, understated, responsible, interested, rational

Social Values

Top defining Values

Personal Control: They focused on maintaining a sense of autonomy and self-direction in their lives. Many are retired, with time to do the things they want to do.

Importance of Spontaneity: They enjoy surprises and the unexpected – they will welcome those that help them learn more about themselves and the world.

Culture Sampling: They show a tendency to incorporate foreign cultures into their lives, like going to an Inuit art gallery or dining at a Thai restaurant.

Everyday Ethics: They feel it's important to be responsible, upstanding citizens.

Skepticism towards Advertising: Their tendency to question authority, extends to commercials trying to sell something. They believe that individuals are responsible for their own decisions.

Ecological Concern: They are concerned about the health of the planet and what that means to future generations.

Bottom defining Values

Joy of Consumption: Although they are relatively affluent and confident financially, they are not avid consumers.

Living Virtually: They want to connect with the real world authentically and are not content to do so by way of TV, computers or the internet.

Importance of Brand: They care little about brands – but they're not afraid to pay for quality if it matches their values.

Travel Values

The Authentic Experiencer is a more learned, understated traveller. Travel is not their only interest in life, but they certainly appreciate it when they go. They prefer to do their own thing while at a destination, having control over what they see and when they see it.

An Authentic Experiencer will seek:

Living History/Culture: Love to learn about and absorb themselves in the ancient history, as well as the modern cultures, of the places they visit.

To Understand Cultural Differences: While they are not high on the trend Comparison Travel, they love to observe the difference between destinations.

An Authentic Experiencer will avoid:

Hedonistic Rejuvenation/Comfort-seeking: This EQ type does not shy away from living like the locals do. They like to be in control while they vacation, and don't need to be pampered and have everything taken care of for them.

Escape: These travelers do not feel overwhelmed by life. Travel is not about escape for them, but about personal development and learning instead.

Experience Appeal

Authentic Experiencers are more selective in the experiences they find appealing to do on a long-haul trip.

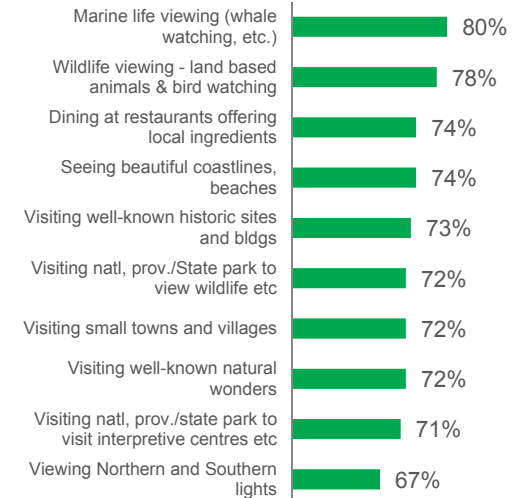
Authentic Experiencers are more likely than other travellers to be interested in:

1. Exhibits, Architecture, Historic Sites/Buildings, Museums

Authentic Experiencers are also interested in:

1. Nature Observation Activities
2. Sightseeing Activities
3. Shopping, Dining and Other Food-related Activities
4. Entertainment, Performing Arts and Amusement Parks
5. Accommodation-related Activities
6. Cruises & Touring
7. Water-based Outdoor Activities
8. Hands-on Learning Activities
9. Festivals, Events & Spectator Sports
10. Outdoor/Nature Sports & Activities
11. Winter Outdoor Activities

Top 10 Most Appealing Activities Among Authentic Experiencers:





Country-specific EQ Profiles

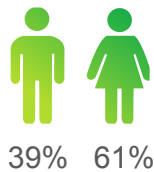
<i>2015 series</i>	<i>2012 series</i>	<i>2009 series</i>
<ul style="list-style-type: none">• Mexico• China	<ul style="list-style-type: none">• Australia• Canada• France• Germany• UK• US	<ul style="list-style-type: none">• Japan• South Korea

Australia
Free Spirits
 16% of Australian Market



Demographics

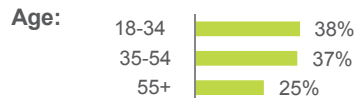
averages refer to market total



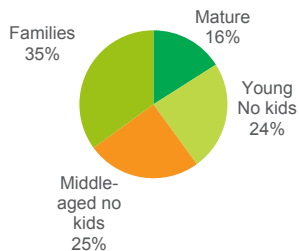
Education: Average

Employment: Above avg. FT, students & home-makers

Household Income: Higher than average



Lifestage



Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they bask in high-end hedonistic experiences that are shared with others.

Social Values

Top defining Values

Joy of Consumption: Australian Free Spirits find shopping highly gratifying. They are more likely than their global counterparts to appreciate a bargain, but they'll spend more on something if it was worth the investment.

Importance of Aesthetics: Will appreciate the appeal of the packaging as well as what's contained in the package.

Pursuit of Novelty: Trying out new things is thrilling!

Entrepreneurialism: Appreciate the freedom of being your own boss rather than working for someone else.

Personal Challenge: They tend to finish what they start.

Need for Status Recognition: They have a desire to be recognized socially for their style and manners.

Bottom defining Values

Anomie-Aimlessness: Australian Free Spirits have personal goals and enjoy the challenge of meeting them.

Travel Values

A Free Spirit will seek:

Hedonistic Rejuvenation: Vacation is a time to be carefree and indulge – they will enjoy spa, nightlife and great cuisine and other opportunities for a little pampering.

Exhibitionism: They seek fun experiences that allow them to vibrantly express themselves, like dancing in nightclubs

Constant Travel: Always looking forward to planning and taking the next trip. Between trips they will read travel articles to inspire their future plans to visit new places.

Luxury Travel: Often aspire to stay in the most luxurious accommodations and venues.

A Free Spirit will avoid:

Group Travel: They prefer unstructured travel – travelling independently allows them the freedom for spontaneity. They don't want to be constrained by itineraries.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Dining at restaurants offering local ingredients
3. Wildlife viewing - land based animals & bird watching
4. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
5. Taking a day cruise
6. Seeing beautiful coastline, beaches
7. Food related factory tours (cheese, chocolate, etc.)
8. Visiting aquariums/zoo
9. Visiting well-known natural wonders
10. Shopping - gourmet foods in retail stores

3 of the Least Appealing Activities

1. Snowshoeing
2. Geo-caching
3. Hunting

Last Trip

Party composition & size: On average, all Australian FSs 54% took trips with just two adults. Same for long-haul trips (57%).

Duration: Average trip length was 17 nights, on par with the Australian average (17.5 nights). Long-haul trips were longer (23.8 nights) though on par with the Australian average.

Spend: Average trip spend of \$4,819, in line with the Australian average. Those who travelled long-haul had a much higher spend of \$6,441. In both cases the average spend per person night was higher than the Australian average.

Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at destination
2. Websites of online retailers, travel agencies or tour operators
3. Travel agency/tour operator brochures

Product*:

- More spontaneous and unstructured
- Greater appreciation for activities in vibrant cities (e.g., sightseeing and shopping, dining and food-related activities)
- Less interest in historical, nature, hobbies or roots travel
- Considerably less group travel
- Physically demanding pursuits do not appeal

Price*:

- Slightly more price-sensitive – upscale consumerism does not appeal

Australian Free Spirits

Promotion*:

- More female-focused
- Play up non-conformity
- Avoid heavily branded promotions
- TV travel advertising, TV/radio shows and targeted websites will resonate
- Other digital promotion may not be engaging
- Avoid focusing on nature, stress-relief or physical activities

Close the Sale!

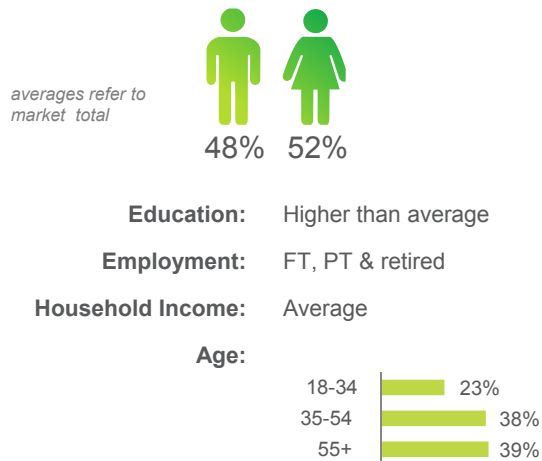
- Partner with airlines, hotels, attraction and services in your area.
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on websites and social channels
- Make it clear how to book online or connect via phone.

**compared to the global Free Spirit*

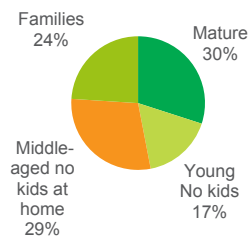
Australia
Cultural Explorers
 15% of Australian Market



Demographics



Lifestage



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Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Social Values

Top defining Values

Importance of Spontaneity: They welcome and appreciate surprises and unexpected situations that add enrichment and interest to their lives.

Everyday Ethics: They are more likely than their global counterparts to employ a personal moral and ethical compass in their everyday lives.

Personal Control: Self assured and independent, they feel in control of their lives and financial security. They are not afraid to take on moderate risk if it means they can learn something new.

Adaptive Navigation: They are not afraid to go off the beaten track and adapt to unforeseen events.

Bottom defining Values

Confidence in Advertising: They have very low faith in advertising and do not tend to identify with the role models promoted by advertising.

Importance of Brand: Although they care about their personal appearance, they are not enthusiastic consumers and care little about brands.

Travel Values

A Cultural Explorer will seek:

Cultural Immersion The best way to experience a culture is to interact with it as deeply as possible.

Historical Travel Love to learn about and absorb themselves in the ancient history, as well as the modern cultures of the places they visit.

Unstructured Travel: Prefer not to be constrained to “tourist” schedules or destinations, and will chart their own courses.

Constant Travel: Travel is the best way to experience life and learn about different places and cultures – between trips they like to read travel articles to inspire their next trip.

Nature Travel: They will choose destinations that provide opportunities to experience natural beauty.

A Cultural Explorer will avoid:

Comfort Seekers: Not afraid to step outside of their comfort zone. Tasting new foods, learning about the culture and mingling with the locals is part of the experience.

Luxury Travel: Their focus is upon learning about the culture, not indulging in luxury.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Visiting small towns, villages
3. Visiting national, provincial/State park to view wildlife and surrounding nature and/or to participate in adventure experiences
4. Wildlife viewing - land based animals & bird watching
5. Dining at restaurants offering local ingredients
6. Visiting well-known natural wonders
7. Seeing beautiful coastline, beaches
8. Visiting World Heritage Sites
9. Interacting with the local inhabitants, people
10. Strolling around a city to observe its unique buildings and architecture

3 of the Least Appealing Activities

1. Snowshoeing
2. Golfing
3. Geo-caching

Last Trip

Party composition & size: The majority travelled child-free on last trip (74%). This is also true of those who travelled long-haul.

Duration: Almost a week longer than the Australian average (24.0 nights vs. 17.5 nights). Long-haul trips lasted longer than a month (33.0 nights vs. 24.8).

Spend: Higher than average trip spend of \$5,453 - related to longer trip duration. Those who travelled long-haul had an even higher spend of \$7,100.

Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at destination
2. Travel guides and books
3. Websites of regional or city tourism offices

Product:

- Off-the-beaten path multi-city/destination trips
- Multicultural activities and opportunities to connect with locals
- Emphasize activities such as fishing, multi-day tours and staying at a wilderness lodge
- They are less interested in winter activities*

Price:

- Discriminating consumers who will appreciate deals, coupons and promotions

Australian Cultural Explorers

Promotion:

- Varied media mix, heavy emphasis on travel guides and books, Media Relations/Unpaid Media and Websites
- Word-of-Mouth advocacy is influential
- Approachable, authentic and low-key
- Avoid heavy presence of brand
- Highlight multicultural experiences and opportunities to connect with locals
- Avoid emphasizing "escaping it all"

Close the Sale!

- Partner with airlines, hotels, attraction and services in your area
- Include a clear 'call to action' on websites and social channels
- Make it clear how to book online or connect via phone.

**compared to the global Cultural Explorer*

Australia

No-Hassle Travellers

11% of Australian Market



Demographics

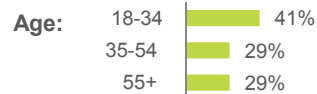
averages refer to market total



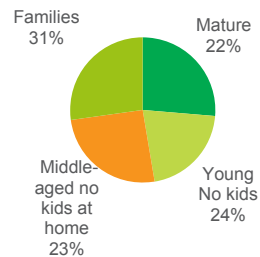
Education: Lower than average

Employment: FT; higher than avg. are homemakers or unemployed

Household Income: Average



Lifestage



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No-Hassle Travellers are extroverted, flashy people who seek secure group travel, allowing them to be pampered in luxurious surroundings while seeing all the main sights of a destination.

Social Values

Top defining Values

Financial Security: They feel optimistic about their financial future.

Ostentatious Consumption: Unlike their global counterparts, they are big spenders – and more likely to want to use their purchases to impress others.

Confidence in Advertising: They are more likely to believe what they are told about a product.

Aversion to Complexity: They like things to be simple and predictable. Life is complex enough.

Importance of Brand: They believe in the quality of big-name brand items.

Bottom defining Values

Cultural Sampling: They are less interested in gaining a deeper understanding of other cultures.

Importance of Spontaneity: They are less interested in trying new things or in being spontaneous and shy away from surprises or the unexpected.

Travel Values

A No-Hassle Traveller will seek:

Comfort Seekers: Their comfort is aligned with 'just like home' experiences.

Checklist Travel: They love to compare their vacations with others, so they will sample the must-see spots in order to talk about them when they get home.

Luxury Travel/Hedonistic Rejuvenation: More likely than their global counterparts to want to unwind and pamper themselves on vacation.

Exhibitionism: They love fun experiences that allow them to show off a bit, and express themselves in a way that draws attention.

A No-Hassle Traveller will avoid:

Nature Travel: holds significantly less appeal for Australian NHTs than for their global counterparts.

Historical Travel: Not as interested in the history of the places they visit.

Unstructured Travel: Travel is a social event, and best shared with others in a more structured group that offers security and predictability.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Taking a day cruise
3. Staying at a waterfront resort
4. Food related factory tours (cheese, chocolate, etc.)
5. Visiting aquariums/zoos
6. Seeing beautiful coastlines, beaches
7. Dining at restaurants offering local ingredients
8. Visiting well-known natural wonders
9. Visiting small towns, villages
10. Visiting national, provincial/state park to view wildlife and surrounding nature and/or to participate in adventure experiences

3 of the Least Appealing Activities

1. Undertaking travel philanthropy/Voluntourism
2. Cycling - mountain
3. Geocaching

Last Trip

Party composition & size: Significantly more likely than average to have gone on trips with 3 or more adults. Majority (72%) travelled child-free on last trip.

Duration: Typically took trips of about two weeks (14.3 nights). On long-haul trips they stayed for longer (average 3 wks). In both cases shorter than the Australian average.

Spend: Typically spent \$4,823 per trip, or \$176 per person per night. Long-haul trip spend was \$6,410 (\$204/person). Spend levels are on par with the Australian average

Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at destination
2. Travel agency or tour operator brochures
3. Discussions with travel agency and/or tour operator

Product:

- Include group travel opportunities, luxury and hedonistic rejuvenation and the 'must-sees'
- Allow them to have fun and show off
- Cruises & touring, accommodation-related activities, entertainment, performing arts & amusement parks all hold appeal

Price:

- May have less price sensitivity than their global counterparts due to their tendency to be impulsive and their desire to show off and impress

Australian No-Hassle Travellers

Promotion:

- Through travel agencies/tour operators
- Traditional travel advertising
- Leverage strong social media interest
- Convey luxury, indulgence
- Convey sampling the iconic sites
- Convey young people having fun

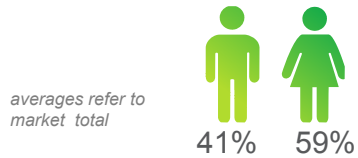
Close the Sale!

- Partner with airlines, hotels, attraction and services in your area.
- Include a clear 'call to action' on your website
- Make it clear how to book online or connect via phone.

Australia
Social Samplers
 14% of Australian Market



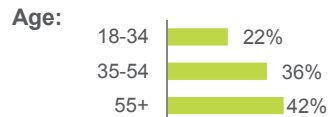
Demographics



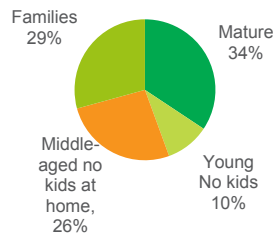
Education: Average

Employment: FT, higher than avg. PT or retired

Household Income: Average



Lifestage



Social Samplers are defined by their affinity for travelling in groups, as well as by the idea that time is limited while travelling, thus they show a preference for focusing on 'must-see' attractions.

Social Values

Top defining Values

Living Virtually: Australian Social Samplers enjoy using TV, computers, watching movies, etc.

Meaningful Moments: They cherish the ordinary moments in everyday life - sharing them with family is considered important by this group.

Discerning Hedonism: It's important to savour the pleasures in life that are meaningful to them.

Obedience to Authority: Social Samplers have a high respect for authority.

Pursuit of Novelty: Trying out new things is thrilling!

Bottom defining Values

Cultural Assimilation: They are open to different cultural backgrounds.

Social Mobility: Although Australian Social Samplers feel confident about their financial situation and future, they are less concerned with acquiring new knowledge and/or skill to move them up in the world.

Travel Values

A Social Sampler will seek:

Group Travel: They are more motivated to travel in groups for the social aspect they provide, not necessarily because they are overly concerned with security.

Historical Travel: They have a strong interest in attractions with a rich historical background.

Samplers: They tend to be more structured travellers who have well-planned itineraries that get them to all of the main attractions and sites for which the destination is renowned.

Shared Experiences: They enjoy socializing and sharing the experience with others.

Nature Travel: They have a strong interest in experiencing beautiful, natural surroundings.

Constant Travel: Travel is truly a rewarding aspect of a Social Sampler's life.

A Social Sampler will avoid:

Comfort-Seeking: They do not shy away from experiences that may take them out of their comfort zone.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Seeing beautiful coastline, beaches
3. Wildlife viewing - land based animals & bird watching
4. Dining at restaurants offering local ingredients
5. Taking a day cruise
6. Visiting small towns, villages
7. Visiting national, provincial/State park to view wildlife and surrounding nature and/or to participate in adventure experiences
8. Visiting well-known historic sites and buildings
9. Visiting well-known natural wonders
10. Touring, sightseeing in rural areas

3 of the Least Appealing Activities

1. Snowshoeing
2. Geo-caching
3. Skiing – Cross-Country (Nordic)

Last Trip

Party composition & size: Australian SSs are slightly more likely to take trips with 3+ adults and are more likely than the Australian average to travel with friends.

Duration: On average, all Australian SSs took trips of 18.9 nights, on par with the Australian average (17.5 nights). For long-haul trips, 40% stayed for more than 3 weeks (avg. 25.1 nights).

Spend: Average trip spend was \$5,057. They had a higher than average per person per night spend (\$216 vs. \$192). Long haul spend was \$6,889.

Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at destination
2. Travel agency and tour operator brochures
3. Travel guides and books

Product:

- Package holidays/tours taking 'must-see' attractions
- Multi-city/multi-region trips
- Sensual experiences
- Destinations with creative, multi-media elements
- Tours in rural areas

Price:

- Value for money counts, but they may be willing to splurge for convenience of package/group tours

Australian Social Samplers

Promotion:

- Heavy emphasis on coverage in TV/radio shows, magazines and newspapers
- Highlight 'must-sees' and socially responsible and ethical features
- Emphasize safety and opportunities to connect with others
- Emotional and imaginative appeal will resonate
- Get people talking - word of mouth and mouse

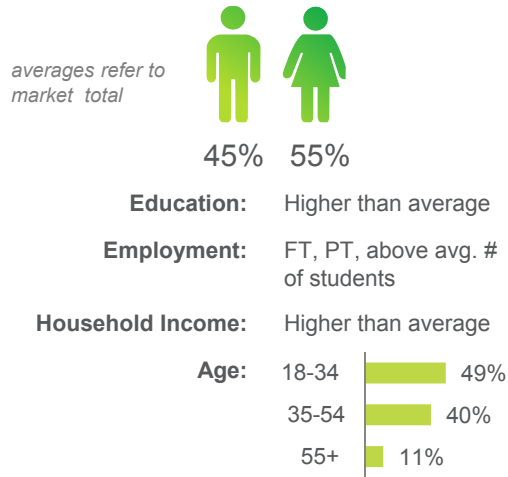
Close the Sale!

- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on websites with ability to book online or connect via phone.
- Airline, hotels, attraction and other service websites are sales channels to consider

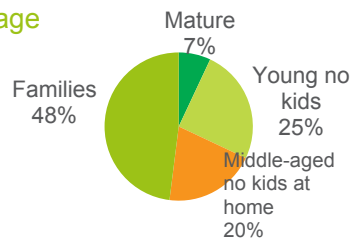
Canada
Free Spirits
 12% of Canadian Market



Demographics



Lifestage



Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they indulge in high-end experiences that are shared with others.

Social Values

Top defining Values

- Importance of Brand:** A brand name is an indicator of quality, style and status.
- Need for Status Recognition:** They want to show off their success to the world.
- Joy of Consumption:** Love to shop! Free Spirits find shopping highly gratifying, but they are not impulsive. They are discriminating consumers and will shop around to get what they want, which is not necessarily the cheapest product.
- Penchant for Risk:** They are confident risk-takers, secure in their ability to reach their goals no matter what obstacles they may face.
- Selective Use of Professional Services:** They are willing to trust professionals to help them with major purchases or planning.

Bottom defining Values

- Skepticism Towards Advertising:** Not mistrustful of societal institutions like government or big business, Free Spirits have a degree of confidence in advertising.

Travel Values

A Free Spirit will seek:

- Comparison Travel:** They love to travel – and brag about the superiority of the places they have visited
- Luxury:** They often aspire to stay in the most luxurious accommodations and venues.
- Samplers:** They want to see all the main attractions, but not in depth – they will employ detailed itineraries, ensuring that they don't miss anything!
- Shared Experiences:** Free Spirits are attracted to groups where they can socialize and share the experience with others – using social media for sharing during and after the trip.
- Exhibitionism:** They enjoy being the centre of attention and will dance the night away in a nightclub.
- Hedonistic Rejuvenation:** Vacation is a time to be carefree and indulge – they will enjoy spa, nightlife and great cuisine and other opportunities for a little pampering.

A Free Spirit will avoid:

- Reluctant travel:** Free Spirits are always planning their next trip – they are not content to experience the world through the Internet or TV.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing - land based animals & bird watching
3. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure
4. Dining at restaurants offering local ingredients
5. Viewing Northern/Southern Lights/Aurora
6. Visiting aquariums/zoos
7. Visiting well known historic sites and buildings
8. Visiting amusement/theme parks
9. Staying at an international brand hotel
10. Visiting national, provincial/state parks to visit interpretative centres/museums

3 of the Least Appealing Activities

1. Farm stays
2. Undertaking travel philanthropy/voluntourism
3. Staying at a hostel

Last Trip

Party composition & size: while the majority tend to take trips with adults (62%) they are more likely than average to take children with them on long-haul trips (39% vs. 27%).

Duration: Most Canadian FSs took trips between 4-7 nights (39%), but they have a higher than average likelihood to have travelled for 8-14 nights (27% vs. 22%). Avg duration: 9.7 nights.

Spend: All Canadian FSs had a higher than Canadian average spend of \$3,498 per party per trip.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at destination
3. Discussions w/ friends, family, business colleagues

Product:

- More active participation*
- More entertainment*
- Involves the main sights
- Kid-friendly for those who travel in the family
- Social events, festivals
- Multi-faceted
- Convenient

Price:

- Offer a range of options
- Menu of choices

Canadian Free Spirits

Promotion:

- Get people talking
- Lively and direct
- Even stronger new media presence, coupled with traditional travel advertising*
- They want to read about the 'must sees' in publications (media relations)
- Stylish
- Emphasize comfort and the familiar

Close the Sale!

- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Partner with airlines, hotels, attraction and services in your area
- Include a clear 'call to action' on websites and social channels
- Make it clear how to book online or connect via phone

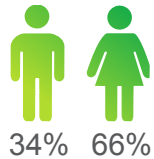
**compared to the global Free Spirit*

Canada
Cultural Explorers
 9% of Canadian Market



Demographics

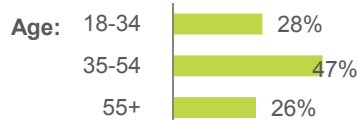
averages refer to market total



Education: Average

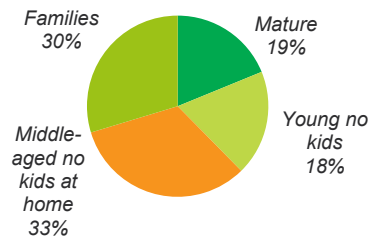
Employment: FT, slightly above avg. # of homemakers

Household Income: Average



Lifestage

41% are single!



Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Social Values

Top defining Values

Cultural Sampling: They believe that other cultures have a lot to teach them.

Personal Creativity: They love to use their imagination and creativity at work and play and sharing their ideas with others.

Personal Control: They feel in control of their lives and not afraid to take on moderate risk if it means they can learn something new.

Need for Uniqueness: They like to be different from others, and will pay attention to their manner of dress and appearance.

Social Responsibility: They believe in giving back to those in need.

Personal Escape: They long for that which is beyond the practical - want to experience beauty and pleasure in surprise and astonishment.

Bottom defining Values

Ostentatious Consumption: They are not highly materialistic and are offended by ostentatious consumption.

Aversion to Complexity: They are not intimidated by changes or complexities in society. Being spontaneous is thrilling and fun for them.

Travel Values

A Cultural Explorer will seek:

Unstructured Travel: They prefer not to be constrained to “tourist” schedules or destinations, and will chart their own courses.

Historical Travel: They love to learn about and absorb themselves in the ancient history, as well as the modern cultures of the places they visit.

Cultural Immersion: The best way to experience a culture is to interact with it as deeply as possible.

Nature Travel: They will choose destinations that provide opportunities to experience natural beauty.

Shared Experiences: They are attracted to groups where they can socialize and share the experience with others – using social media for sharing during and after the trip.

A Cultural Explorer will avoid:

Comfort-Seeking: This EQ type seeks an authentic experience and doesn’t need to be pampered in commercial hotels.

Reluctant Travel: They are always planning their next trip – they are not content to experience the world through the Internet or TV.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Attending farmers' markets
3. Dining at restaurants offering local ingredients
4. Visiting national, provincial/state parks to visit interpretative centres/museums
5. Wildlife viewing - land based animals & bird watching
6. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
7. Viewing outdoor street performances (free)
8. Viewing Northern/Southern Lights/Aurora
9. Visiting small towns, villages
10. Food related factory tours (Cheese, chocolate, etc.)

3 of the Least Appealing Activities

1. Participating in multi-day guided group tours by bus
2. Golfing
3. Hunting

Last Trip

Party composition & size: 74% took child-free trips, mainly travelling in groups of 2 adults.

Duration: 36% took trips between 4-7 nights duration, and a higher than average proportion took trips between 8-14 nights (28% vs. 22% for Canada). Avg: 10.4 nights

Spend: Average party spend is \$3,141 per trip. More was spent on long-haul trips - on average \$3,851 per trip

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at destination
3. Discussions w/ friends, family, business colleagues

Product:

- Interactive and immersive experiences
- Beautiful scenery, active adventure, shopping, dining and outdoor festivals/events
- Allows free exploration
- Environmentally, socially responsible

Price:

- Will pay for unique experiences, local, sustainable, ethical products
- Value for money
- Respond well to discounts and feeling like they are getting a 'deal'
- Transparency of offering

Canadian Cultural Explorers

Promotion:

- Get people talking (word of mouth and word of mouse)
- Varied and extensive media mix, heavy emphasis on websites
- Include other traveller reviews
- Social connection with locals
- Stylish, creative
- Traditional Advertising (newspaper, magazine, billboard)

Close the Sale!

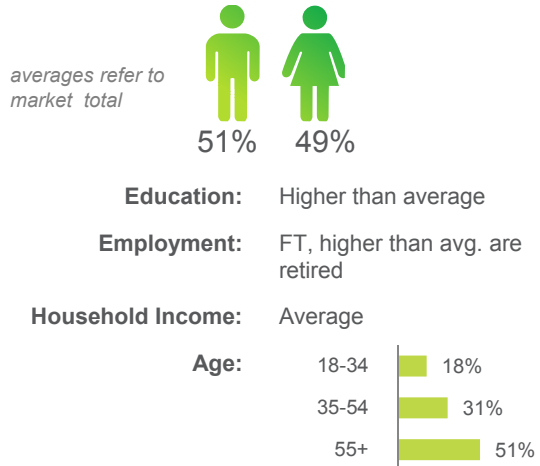
- Partner with airlines, hotels, attraction and services in your area
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on websites and social channels
- Make it clear how to book online or connect via phone

**compared to the global Cultural Explorer*

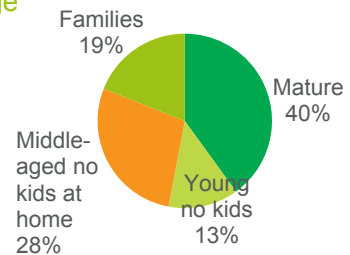
Canada
Authentic Experiencers
 12% of Canadian Market



Demographics



Lifestage



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Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a particular interest in understanding the history of the places they visit.

Social Values

Top defining Values

Personal Control: They are focused on maintaining control and autonomy in their lives. Many are retired, with time to do the things they want to do.

Financial Security: They feel optimistic about their financial future; more so than global AE's.

Cultural Sampling: They show a tendency to incorporate foreign cultures into their lives, like going to an Inuit art gallery or dining at a Thai restaurant.

Importance of Spontaneity: They enjoy the unexpected in life - they welcome and appreciate surprises.

Ecological Concern: They are concerned about the health of the planet and what that means to future generations.

Bottom defining Values

Importance of Aesthetics: With a more functional and pragmatic approach to life they are unlikely to be swayed by beauty or appearance.

Joy of Consumption: Although they are relatively affluent and confident financially, they are not avid shoppers, deriving little enjoyment from the act of consumption

Travel Values

An Authentic Experiencer will seek:

Historic Travel: They love to learn about and absorb themselves in the history and culture of the places they visit. They will research before they leave and take their time in historic sites and museums.

An Authentic Experiencer will avoid:

Comfort Seekers: This EQ type does not shy away from living like the locals do. This is more important than staying somewhere with the comforts of home.

Luxury Travel: They are unlikely to seek out luxury amenities or gourmet experiences.

Group Travel: They prefer to do their own thing.

Escape: Travel is not about escape from the day to day, they need not disconnect in order to relax.

Hedonistic Rejuvenation: They are unlikely to be carefree and indulgent when traveling – their focus is on learning

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing - land based animals & bird watching
3. Visiting small towns, villages
4. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
5. Seeing beautiful coastlines, beaches
6. Visiting national, provincial/state parks to visit interpretative centres/museums
7. Visiting well known historic sites and buildings
8. Dining at restaurants offering local ingredients
9. Mountain and glacier viewing
10. Visiting well-known natural wonders

3 of the Least Appealing Activities

1. Attending nightclubs/lounges
2. Motorcycling
3. Snowmobiling as an overnight touring trip

Last Trip

Party composition & size: 78% of Canadian AE's took child-free trips (vs. Canadian average of 72%).

Duration: Canadian AEs typically take longer trips that the average - 12.7 nights overall and 15.7 nights for long-haul travel.

Spend: Canadian AEs have an average per party spend of \$3189 per trip, \$3859 for long-haul..

Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at destination
2. Websites of online retailers, travel agencies or tour operators
3. Travel guides and books

Product:

- Historical Travel
- Features opportunities to meaningfully connect with locals
- More low-impact activities, but also some active and hands-on*
- Authentic, living culture
- Creates opportunities for shared experiences

Price:

- Reasonable

Canadian Authentic Experiencers

Promotion:

- Get people talking – word of mouth or word of mouse
- Traditional media and Internet – more use websites of regional or city tourism offices
- Practical details
- Catered to older demo
- Non-touristy
- Promotion in Travel Guides
- Articles in Newspapers

Close the Sale!

- Partner with airlines, hotels, attraction and services in your area
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on your website
- Make it clear how to book online or connect via phone

**compared to the global Authentic Experiencer*

Canada

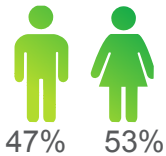
Personal History Explorers

13% of Canadian Market



Demographics

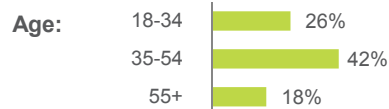
averages refer to market total



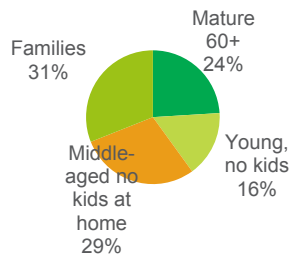
Education: Average

Employment: FT, or retired

Household Income: Average



Lifestage



As travellers, Personal History Explorers are primarily defined by their desire to connect to their own cultural roots – and do so by travelling in comfort, style and security.

Social Values

Top defining Values

Discerning Hedonism: They love to savour life's pleasures, whenever they can.

Social Intimacy: They seek meaningful connections with others that lead to a better understanding of their own roots.

Need for Status Recognition: They want the fruits of their labour to show. They enjoy new technology, and will buy the latest gadgets to show off. Discounts are not as important for the Canadian PHE.

Search for Roots: They are more interested in understanding their own history and culture, rather than the cultures of others. Part of this is honouring traditional family passages, like births, marriages, deaths, etc.

Concern for Appearance: They are very image-conscious and place a great deal of importance on appearing attractive.

Bottom defining Values

Buying on Impulse: Although they are avid consumers, they try to balance this with their desire to be savvy, price-conscious buyers.

Personal Control: They have learned to adapt to whatever life presents to them.

Travel Values

A Personal History Explorer will seek:

Roots Travel: Their most important travel motivation is interest in understanding ancestry, heritage.

Comfort/Luxury Seekers: They want their creature comforts and will splurge on the finer things, including luxurious accommodations when on vacation. Canadian PHEs also enjoy active adventure.

Security Concern: They tend to be anxious travellers, fearful for their personal security

Checklist Travel: They want to see all the main attractions but don't need to go in depth with any.

Shared Experience: Attracted to groups where they can socialize and share the experience with others.

Hedonistic Rejuvenation: Vacation is a time to be carefree and indulge – they will enjoy spa, great cuisine and other opportunities for a little pampering.

A Personal History Explorer will avoid:

Reluctant travel: Canadian PHEs have a greater interest in frequent travel than the Global PHE.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing - land based animals & bird watching
3. Seeing beautiful coastlines, beaches
4. Taking a day cruise
5. Visiting national, provincial/state parks to visit interpretative centres/museums
6. Viewing Northern/Southern Lights/Aurora
7. Dining at restaurants offering local ingredients
8. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
9. Attending farmers' markets
10. Seeing autumn leaves

3 of the Least Appealing Activities

1. Participating in vocational learning
2. Undertaking travel philanthropy/voluntourism
3. Attending literary festivals or events

Last Trip

Party composition & size: Most travelled as 2 adults (41%) but they were more likely than average to travel with children.

Duration: Average trip duration for all PHEs was an average 9.3 nights. The average duration for a long-haul trip was 10.9 nights.

Spend: Average total party spend of \$2,629; those who travelled long-haul spent more at \$3,489 – both amounts similar to the Canadian average.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at destination
3. Discussions with friends, family, business colleagues

Product:

- Cultural heritage, reconnection
- Allows cultural immersion
- Group activities/tours
- Seeing all the highlights with greater focus on nature
- Less active options available

Price:

- Good value
- Discounts not as imperative

Canadian Personal History Explorers

Promotion:

- More traditional travel advertising
- Emphasis on social aspects and gatherings
- Get people talking (friends/family)

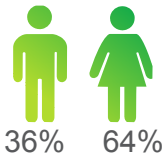
Close the Sale!

- Partner with airlines, hotels, attraction and services in your area
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on your website
- Make it clear how to book online or connect via phone

Canada
No-Hassle Travellers
 10% of Canadian Market



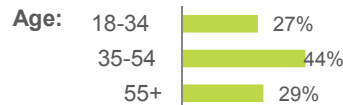
Demographics



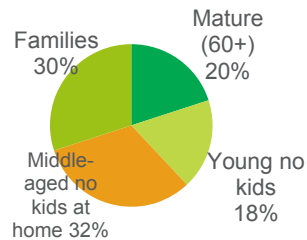
Education: Average

Employment: FT, higher than avg. homemakers, students or unemployed

Household Income: Average



Lifestage



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No-Hassle Travellers are cautious, dutiful and reserved people who seek secure group travel that allows them to escape from the duties and obligations of everyday life.

Social Values

Top defining Values

Personal Control: They are seeking more control over the events that impact their lives.

Need for Status Recognition: They desire to be held in esteem and respect by others, through good manners, taste and style.

Skepticism Towards Advertising: They do not turn to or appreciate advertising – downplay the importance of brands as markers of quality.

Meaningful Moments: They cherish the ordinary moments in everyday life – they will take time to indulge in individual pleasures.

Work Ethic: A strong work ethic is important, as is a sense of duty to others. Many are women, and they tend to believe in the equality of the sexes in the workplace.

Bottom defining Values

Adaptability to Complexity: They are overwhelmed by challenges and changes - they tend to trail other types in adopting the latest technologies.

Penchant for Risk: They tend to not set difficult or risky goals for themselves.

Travel Values

A No-Hassle Traveller will seek:

Group Travel: They are more comfortable travelling with other people or a guide or on an organized tour.

Security Concern: Anxious travellers, they worry about being robbed or other negative experiences.

Escape: They want to get away from it all and have a break from their responsibilities back home.

Hedonistic Rejuvenation: Vacation is a time to be carefree and indulge – they will enjoy spa, great cuisine and other opportunities for a little pampering.

A No-Hassle Traveller will avoid:

Cultural Immersion: They are not interested in immersing themselves in the culture of the places they visit – they prefer to ‘observe’ rather than ‘live like a local’.

Unstructured Travel: They are not interested in going with the flow, and not knowing where they will be or what they will be doing. They prefer more certainty and predictability.

Constant Travel: They do not live to travel and do not believe travel is needed to truly experience life.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Seeing beautiful coastlines, beaches
3. Dining at restaurants offering local ingredients
4. Wildlife viewing - land based animals & bird watching
5. Visiting well known historic sites and buildings
6. Visiting well-known natural wonders
7. Visiting aquariums/zoos
8. Visiting national, provincial/state parks to visit interpretative centres/museums
9. Staying at a waterfront resort
10. Viewing Northern/Southern Lights/Aurora

3 of the Least Appealing Activities

1. Staying at a hostel
2. Motorcycling
3. Hunting

Last Trip

Party composition & size: 73% travelled child-free on their last trip (on par with the Canadian average).

Duration: Shorter than average – all Canadian NHTs had an average trip duration of 8.6 nights (vs. 10 nights), and long-haulers took trips of about a week and a half (10.4 nights vs. 12 nights).

Spend: Mean party spend is within the average Canadian range for last trip at \$2,664 (all) and \$3,822 (long-haul).

Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at destination
2. Discussions w/ friends, family, business colleagues
3. Websites of online retailers, travel agencies or tour operators

Product:

- Organized tours
- Natural wonders
- Smaller-scale operations

Price:

- All-inclusive packages, organized tours
- Do not need luxury
- Value for money

Canadian No-Hassle Travellers

Promotion:

- Get people talking – word of mouth or word of mouse
- High quality websites
- Travel guides/books, magazine/newspaper
- Emphasize relaxation, pampering and shared experiences
- Traditional travel advertising
- Email promotions

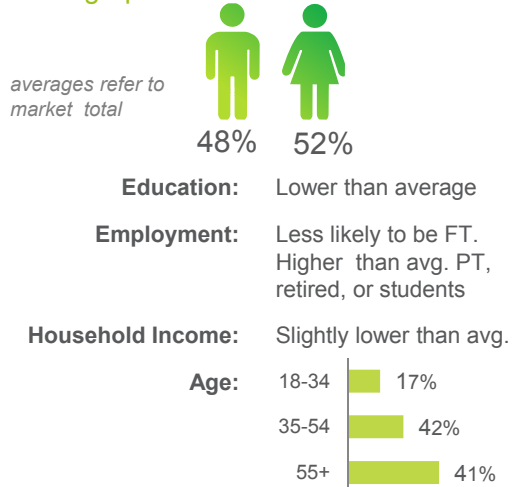
Close the Sale!

- Online travel retailers, tour operators and agencies sites are regularly used by today's travellers
- Include a clear 'call to action' on high quality websites with ability to book online or connect via phone

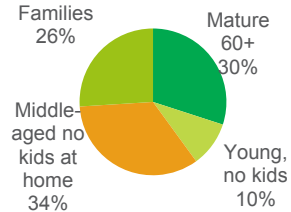
Canada
Rejuvenators
 6% of Canadian Market



Demographics



Lifestage



Rejuvenators are family-oriented people who travel with others to escape from the stresses of everyday life to get pampered and indulge themselves.

Social Values

Top defining Values

Consistent Self: They tend to stand up for their own beliefs – they have little interest in a deeper understanding of themselves or others.

Buying on Impulse: Despite a penchant for saving money, they will give in to impulse while shopping. But, they are not impressed by brands.

Ethical Consumerism: Will check out companies for their practices on labour, mistreatment of animals, etc. before they buy.

Meaningful Moments: They cherish the ordinary moments in everyday life – they will take time to indulge in individual pleasures.

Conformity to Norms: They stick to social conventions and try not to stand apart from others.

Bottom defining Values

Importance of Aesthetics: Their purchasing decisions are more likely to be based on use, rather than beauty.

Attraction for Crowds: Big noisy gatherings are not complementary to their need to get away and relax.

Travel Values

A Rejuvenator will seek:

Comfort Seekers: Canadian Rejuvenators don't like to step out of their comfort zones. They want their travel experiences to be as comfortable and relaxing as possible.

Escape: They are looking to get away from their duties and obligations at home.

Unstructured Travel: They don't want to be concerned with other people's itineraries.

Nature: Being awestruck by nature holds great appeal in their vacations.

Hedonistic Rejuvenation: Vacation is a time to be carefree and indulge – they will enjoy spa, great cuisine and other opportunities for a little pampering.

A Rejuvenator will avoid:

Reluctant Travel: While not constant travellers, neither are they reluctant to travel – it can be a good way to escape the day-to-day.

Historical Travel: They are less interested in understanding the historical relevance of the places they visit, experiencing all the things a place or culture has to offer, and researching the places they are visiting before going there – it is too much like work.

Cultural Immersion: They express less interest in interacting with the local people and learning their language.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing - land based animals & bird watching
3. Mountain and glacier viewing
4. Visiting national, provincial/state park to view wildlife and surrounding nature and/or to participate in adventure experiences
5. Visiting aquariums/zoos
6. Viewing Northern/Southern Lights/Aurora
7. Seeing beautiful coastlines, beaches
8. Seeing autumn leaves
9. Visiting well-known natural wonders
10. Visiting national, provincial/state parks to visit interpretative centres/museums

3 of the Least Appealing Activities

1. Farm Stays
2. Undertaking travel philanthropy/Voluntourism
3. Staying at a hostel

Last Trip

Party composition & size: 52% travel in adult couples; 15% are couples traveling with children or grandchildren.

Duration: The average trip was 8.6 nights, lower than the Canadian average, likely reflecting their enjoyment of short getaways.

Spend: At \$2,607 they also spent less than the Canadian average

Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at destination
2. Discussions with friends, family and business colleagues
3. Websites of online retailers, travel agencies or tour operators

Product:

- Cruises
- Beaches
- Swimming, sunbathing
- Waterfront resorts
- Day programs for their kids

Price:

- All-inclusive packages
- Shoulder season, but not cold

Canadian Rejuvenators

Promotion:

- Emphasize shared travel
- Not heavily branded, flashy
- Online travel advertising
- Word-of-mouth
- Travel agency/tour operator websites
- Fun & lively

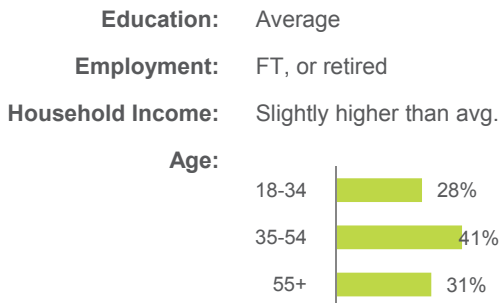
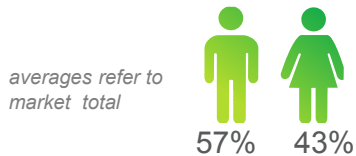
Close the Sale!

- Partner with airlines, hotels, attraction and services in your area
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on your website
- Make it clear how to book online or connect via phone

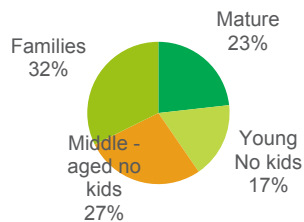
Canada
Gentle Explorers
 25% of Canadian Market



Demographics



Lifestage



Gentle Explorers are primarily defined by their reluctance to venture far beyond the comfort of home and travel 'on condition,' demanding the very best and most comfortable environments for themselves when they must do so.

Social Values

Top defining Values

- Sexism:** They support more traditional views of gender and family structures.
- Advertising as Stimulus:** The least skeptical of all EQ types, they will turn to advertising to help them choose what's best for them.
- Aversion to Complexity:** They lack faith in their ability to deal with the uncertainties of everyday life.
- Confidence in Big Business:** They associate good quality and service with big companies and well-known products.
- Financial Security:** With a higher than average household income, they have more confidence in their financial futures.

Bottom defining Values

- Importance of Spontaneity:** They are less interested in trying new things or in being spontaneous.
- Cultural Sampling:** They are less interested in gaining a deeper understanding of other cultures and do not feel that they have anything to learn from them.

Travel Values

A Gentle Explorer will seek:

- Comfort Seekers:** Averse to experiencing new locations, food and people that require them to adjust to the unfamiliar.
- Group Travel:** They are more comfortable travelling with other people or a guide or on an organized tour.
- Comparison Travel:** Like to point out to others how things are much better at home than in any place they are visiting.
- Luxury:** They want to get the best there is to offer when it comes to hotels, restaurants and shopping, and prefer to stay in a 'gated resort.'

A Gentle Explorer will avoid:

- Historical Travel:** Lower interest in understanding the historical relevance of the places they visit, and experiencing all the things a place or culture has to offer.
- Cultural Immersion:** They are less interested in leaving the beaten path and being exposed to the local way of life, or learning and using the local language.
- Nature:** Not as enthusiastic about experiencing nature as other travellers.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Dining at restaurants offering local ingredients
3. Wildlife viewing - land based animals & bird watching
4. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
5. Seeing beautiful coastlines, beaches
6. Visiting aquariums/zoo
7. Visiting well-known natural wonders
8. Food related factory tours (Cheese, chocolate, etc.)
9. Taking a day cruise
10. Sunbathing

3 of the Least Appealing Activities

1. Participating in vocational learning
2. Undertaking travel philanthropy/Voluntourism
3. Attending literary festivals or events

Last Trip

Party composition & size: The majority travelled child-free on their last trip (73%).

Duration: The average trip duration was 10 nights. Those who travelled long-haul on their last trip took slightly longer trips (11.6 nights), which is slightly below the Canadian average (12 nights).

Spend: At \$2,801 per trip, and \$3,542 for long-haul trips, Canadian GEs spent on par with the Canadian average.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at destination
3. Discussions w/ friends, family, business colleagues

Product:

- Brand name hotels
- Simple fun rather than cultural or learning activity
- Familiar food/drink
- Group Travel
- Casinos, nightclubs, brewery tours, sunbathing, fishing, golfing

Price:

- Affordable packages demonstrating value for money
- Luxury will also appeal

Canadian Gentle Explorers

Promotion:

- Online retailers, travel agencies, tour operators (Expedia)
- Websites of airlines, hotels or services
- Get people talking (friends/family)
- Media Relations (Magazine/newspaper articles)
- Traditional Travel Advertising
- Online travel advertising
- Regional or city tourism Offices

Close the Sale!

- Partner with airlines, hotels, attraction and services in your area
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on websites and social channels
- Make it clear how to book online or connect via phone

France

Free Spirits

8% of French Market



Demographics

averages refer to market total

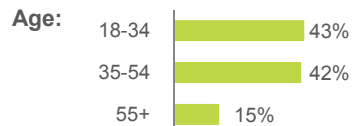


46% 54%

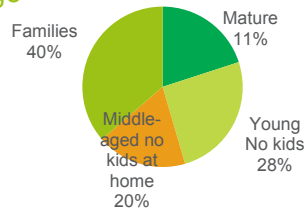
Education: Higher than average

Employment: Most FT, highest proportion of students

Household Income: Average



Lifestage



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Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they bask in high-end hedonistic experiences that are shared with others.

Social Values

Top defining Values

Adaptability to Complexity: Confident in handling the challenges in life – embracing the changes around them.

Penchant for Risk: Open to taking risks to reach their goals or for the thrill of it.

Pursuit of Novelty: They are more likely than their global counterparts to want to explore new products, services and experiences.

Happiness: French Free Spirits have a brighter outlook on the world than their global counterparts, due in part to their greater sense of financial security and control over their own lives.

Attraction for Crowds: Free Spirits are one of the most social of all EQ types. Adept at networking, they enjoy large group atmospheres.

Bottom defining Values

Duty: They don't feel that they need to put duty before personal pleasure.

Conformity to Norms: They feel less pressure to conform – although they share their global counterparts' interest in fashion and trends.

Travel Values

A Free Spirit will seek:

Unstructured Travel: Confident in their own security, they don't seek group travel for safety reasons – unstructured travel allows them more freedom to explore.

Exhibitionism: Free Spirits love being the centre of attention – dancing the night away in a nightclub is a great way to do this.

Escape: They want to get away from it all and have a break from their responsibilities back home.

Cultural Immersion: The best way to experience a culture is to interact with it as deeply as possible

Hedonistic Rejuvenation: Vacation is a time to be carefree and indulge – they will enjoy spa, nightlife and great cuisine and other opportunities for a little pampering.

A Free Spirit will avoid:

Checklist Travel: are less likely to try to do as much as possible on their trip for fear of missing something

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Dining at restaurants offering local ingredients
2. Dining at restaurants serving their home specialties
3. Interacting with the local inhabitants, people
4. Seeing beautiful coastlines, beaches
5. Marine life viewing (whale watching, other marine life)
6. Swimming, tubing, waterskiing, etc.
7. Mountain and glacier viewing
8. Touring, sightseeing in urban areas
9. Attending performing arts - Music
10. Visiting small towns, villages

3 of the Least Appealing Activities

1. Taking an educational tour
2. Participating in paid city day tours (guided/non-guided)
3. Participating in multi-day organized tours by train

Last Trip

Party composition & size: Almost half of all French FSs travelled child-free in groups of two on their last trip (46%), although they are slightly more likely than average to have travelled in groups of two with children (21% vs.17%)

Duration: All French FSs took trips of 13.2 nights, while French Long-haul FSs went for two weeks (14.3 nights).

Spend: All French FSs spent an average of \$1,966 per party and \$93 per person per night, while long-haul travellers typically spent \$2,250 per party and \$103 per person per night. Both are in line with the French average.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at the destination
3. Websites of national tourism offices

Product:

- More spontaneous and unstructured*
- Less interest in historical, hobbies or roots travel*
- Luxury travel not a significant motivator
- Considerably less group travel*
- Greater appreciation for winter outdoor activities*

Price:

- Average
- Less likely to spend highly given less interest in luxury travel*

French Free Spirits

Promotion:

- Still lively, fun, simple – but less focus on luxury and ostentation*
- Word of mouth and mouse
- Operator brochures as greater sources of inspiration*
- Considerably lower use of traditional travel advertising and peer to peer, word of mouth and advocacy for trip planning*

Close the Sale!

- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Partner with airlines, hotels, attraction and services in your area
- Include a clear 'call to action' on websites and social channels
- Make it clear how to book online or connect via phone

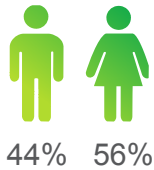
**compared to the global Free Spirit*

France
Cultural Explorers
 14% of French Market



Demographics

averages refer to market total



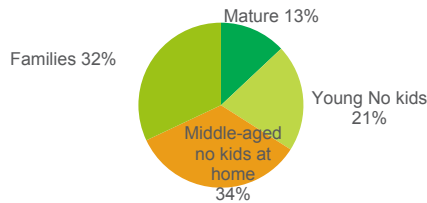
Education: Higher than average

Employment: FT, above avg. PT, students or unemployed

Household Income: Average



Lifestage



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Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Social Values

Top defining Values

Global Consciousness: As citizens of the world, they are concerned with the welfare of others.

Skepticism towards Advertising: This also extends to other areas of commerce – they have low confidence in business and even more apathy toward brands than global CEs.

Importance of Spontaneity: They welcome and appreciate surprises and the unexpected in life.

Aversion to Complexity: Despite appreciating simple surprises, they are less likely to embrace challenges and uncertainty in their everyday lives.

Rejection of Authority: They are critical of and will question the status quo.

Bottom defining Values

Personal Challenge: They are less likely than their global counterparts to want to challenge themselves.

Joy of Consumption: Shopping holds less appeal for this EQ type.

Travel Values

A Cultural Explorer will seek:

Cultural Immersion: The best way to experience a culture is to interact with it as deeply as possible.

Nature: They will choose destinations that provide opportunities to experience natural beauty.

Unstructured Travel: They prefer not to be constrained to “tourist” schedules or destinations, and will chart their own courses.

Historical Travel: Love to learn about and absorb themselves in the ancient history, as well as the modern cultures of the places they visit.

Constant Travel: Always looking forward to planning and taking the next trip. Between trips they will read travel articles to inspire their future plans to visit new places.

A Cultural Explorer will avoid:

Comfort-Seeking: Not into pampering, they are not afraid to leave the comforts of home behind to experience something new.

Luxury Travel: No doubt influenced by their lower income levels, they are unlikely to seek out luxury amenities.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Dining at restaurants offering local ingredients
2. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
3. Visiting World Heritage Sites
4. Seeing beautiful coastlines, beaches
5. Marine life viewing (whale watching, other marine life)
6. Visiting small towns, villages
7. Wildlife viewing - land based animals & bird watching
8. Attending museums
9. Visiting national, provincial/State parks to visit interpretative centres/museums
10. Seeing autumn leaves

3 of the Least Appealing Activities

1. Attending rodeos
2. Participating in multi-day guided group tours by bus
3. Hunting

Last Trip

Party composition & size: The majority of French CEs travelled child free (71%). Avg. party size was 3.4; it was 4.0 for long-haul trips.

Duration: Significantly longer than the French average with an average trip length of 14.0 nights (vs. 12.0); for long haul trips they travelled on average 15.0 nights vs. a French average of 13.1.

Spend: Per party spend is \$1,791 (\$79 per person per night). Long-haul - anticipate an average spend of \$2,099 per party and \$89 per person per night. On par with the French avg. for both.

Top 3 Sources for Trip Planning

1. Travel guides/books
2. Websites of national tourism offices
3. Discussions with past visitors

Product:

- Culturally immersive
- More keen on physically engaging activities, outdoors or in a winter setting*
- Environmentally, socially responsible activities
- Farm stays or visits
- Less emphasis on learning*

Price:

- Budget conscious, unlikely to splurge
- Respond well to 'value for money' offers
- Luxury is not a priority

French Cultural Explorers

Promotion:

- Orient more towards females*
- Varied media mix, emphasis on travel guides/books
- Less focus on social media and traveller reviews*
- Less need for stylish or 'edgy' promotion*

Close the Sale!

- Include a clear 'call to action' on your website
- Make it clear how to book online or connect via phone.

**compared to the global Cultural Explorer*

France
Cultural History Buffs
 12% of French Market



Demographics

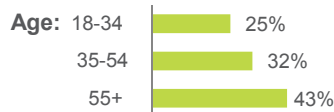
averages refer to market total



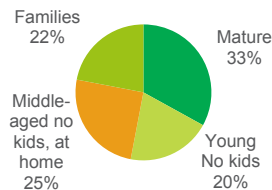
Education: Slightly higher than average

Employment: Most FT, higher than average proportion of Retirees

Household Income: Average



Lifestage



Cultural History Buffs are defined by their focused interest in the history, culture and natural surroundings of the places they visit. They are driven to learn everything about a culture, in the company of other like-minded people..

Social Values

Top defining Values

Importance of Spontaneity: They will embrace the unexpected in their everyday lives.

Intuition and Impulse: Guided by their emotions, they will change opinions easily.

Vitality: They approach life with a sense of vigor and energy.

Personal Control: They want to maintain autonomy and a sense of control over their lives. Many are retired, with time to do the things they want to do.

Adaptability to Complexity: They feel more confident in their ability to deal with the unexpected challenges of everyday life

Bottom defining Values

Personal Challenge: They are less likely than their global counterparts to want to push themselves to their limits

Joy of Consumption: Shopping has less appeal, possibly related to their lower than average income.

Travel Values

A Cultural History Buff will seek:

Historical Travel: Love to learn about and absorb themselves in the ancient history, as well as the modern cultures of the places they visit.

Nature: They will choose destinations that provide opportunities to experience natural beauty.

Cultural Immersion: The best way to experience a culture is to interact with it as deeply as possible.

Constant Travel: They put a high priority on travel, making them an attractive target.

Group Travel: They prefer well-organized trips and the security that comes from being part of a group and where they can share their experiences and socialize.

A Cultural History Buff will avoid:

Luxury Travel: No doubt influenced by their lower income levels, they are unlikely to seek out luxury amenities.

Comfort-Seeking: Not into pampering, they are not afraid to leave the comforts of home behind to experience something new.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Dining at restaurants offering local ingredients
2. Wildlife viewing - land based animals & bird watching
3. Marine life viewing (whale watching, other marine life)
4. Visiting national, provincial/state parks to visit interpretative centres/museums
5. Seeing beautiful coastline, beaches
6. Visiting World Heritage Sites
7. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
8. Visiting small towns, villages
9. Touring, sightseeing in urban areas
10. Dining at restaurants serving their home specialties

3 of the Least Appealing Activities

1. Participating in vocational learning
2. Attending nightclubs/lounges
3. Hunting

Last Trip

Party composition & size: More likely to travel child-free in groups of 3 or more on last trip – much higher than national average (40% vs. 26%). Same proportion travelled as just two adults, but lower than the average (39% vs. 45%)

Duration: All French CHBs took trips of 12.2 nights, while French long-haul CHBs took over just under two weeks (13.1 nights).

Spend: All French Cultural History Buffs typically had a higher than average French traveller's spend on their last trip, both per party (\$2,393 vs. \$1,901) and per person per night (\$98 vs. \$86).

Top 3 Sources for Trip Planning

1. Travel guides/books
2. Websites of online retailers, travel agencies or tour operators
3. Websites of national tourism offices

Product:

- Nature travel
- Group travel & shared experiences
- Planned, structured approach
- Interest in active adventure
- Social responsibility and greater interest in related activities, like eco-touring and voluntourism
- Healthier options and activities to be active will appeal

Price:

- Price-conscious

French Cultural History Buffs

Promotion:

- Varied media mix, emphasis on travel guides/books
- Less focus on social media and traveller reviews & less need for stylish or 'edgy' promotion compared to global counterpart

Close the Sale!

- Include a clear 'call to action' on your website
- Make it clear how to book online or connect via phone.

Germany
Free Spirits
 12% of German Market



Demographics

averages refer to market total

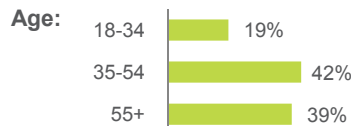


48% 52%

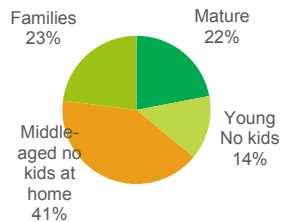
Education: Average

Employment: FT, higher than avg. proportion of Retirees

Household Income: Slightly above avg.



Lifestage



Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they bask in high-end hedonistic experiences that are shared with others.

Social Values

Top defining Values

Attraction for Crowds: Free Spirits are one of the most social of all EQ types. Adept at networking, they enjoy large group atmospheres.

Conformity to Norms: Although they appreciate style, they have a greater desire to fit in.

Social Mobility: French Free Spirits are highly motivated to increase their knowledge and skill base for growth and advancement.

Vitality: They have a lively, energetic approach to life and a greater sense of purpose.

Cultural Sampling: They believe that other cultures have a lot to teach them.

Bottom defining Values

Work Ethic: They favour a stress-free, uncomplicated lifestyle and don't necessarily believe in putting business before pleasure.

Discount Consumerism: They do not take great joy in shopping and are not attracted by discounts, despite feeling less secure financially.

Travel Values

A Free Spirit will seek:

Escape: They like to disconnect from their everyday responsibilities and concerns and relax.

Samplers: They want to spread their time over the 'must-see' experiences, just touching on them superficially.

Hedonistic Rejuvenation: Vacation is a time to be carefree and indulge – they will enjoy spa, nightlife and great cuisine and other opportunities for a little pampering.

Historical Travel: They enjoy visiting sites where important historical events took place.

Shared Experience: Attracted to groups where they can socialize and share the experience with others.

A Free Spirit will avoid:

Comfort-Seeking: They are more than willing to 'rough it' and experiment with new foods, customs and experiences when they travel. Unlike other Free Spirits, they are not as interested in luxury.

Reluctant travel: Not content to experience the world through the Internet or TV, they love to travel – but they are less likely to use it to impress their friends.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing - land based animals & bird watching
3. Visiting national, provincial/state parks to visit interpretative centres/museums
4. Dining at restaurants offering local ingredients
5. Seeing beautiful coastlines, beaches
6. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
7. Dining at restaurants serving their home specialties
8. Mountain and glacier viewing
9. Visiting well known historic sites and buildings
10. Seeing autumn leaves

3 of the Least Appealing Activities

1. Staying at a boutique hotel
2. Golfing
3. Hunting

Last Trip

Party composition & size: Majority of all German FSs tended to take trips with just two adults (55%), 24% take children with them. Long-haul travel – 22% travel with children, 57% as just 2 adults.

Duration: The average trip duration for all German FSs was 13 days, compared to almost 17 days (16.8 nights) for German long-haul Free Spirits. On par with the German average in both cases.

Spend: All German FSs had a higher than average trip spend of \$2,168, or \$96 per person, per night. Those who went on long-haul trips spent even more (\$3,029/\$120)

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Travel agency/tour operator brochures
3. Discussions with past visitors

Product:

- Same love of historical, nature, cultural immersion and hobbies travel*
- Less luxury-focused*
- More group travel*
- Greater appreciation for educational activities*
- Quite 'outdoorsy'

Price:

- Possibly greater price sensitivity*
- Will pay well for products that are seen as good quality and value

German Free Spirits

Promotion:

- Still lively, fun, simple – but less focus on luxury, youth and ostentation
- More attention paid to travel agency and tour operator brochures as greater sources of inspiration and planning
- More TV/radio, newspaper/magazine /billboard ads and unpaid media
- Showcase Western & Eastern Canada, as well as mountains for winter outdoor activities

Close the Sale!

- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Make it clear how to book online or connect via phone.
- Include a clear 'call to action' on websites and social channels

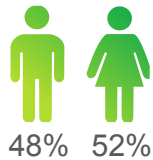
**compared to the global Free Spirit*

Germany
Cultural Explorers
 17% of German Market



Demographics

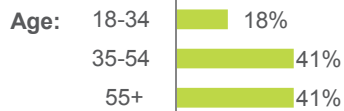
averages refer to market total



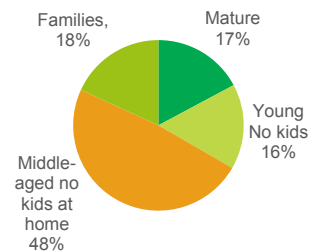
Education: Higher than average

Employment: FT

Household Income: Higher than average



Lifestage



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Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Social Values

Top defining Values

Importance of Spontaneity: They appreciate unexpected events and surprises that take them out of the everyday routine.

Vitality: They have a lively, energetic approach to life and a greater sense of purpose.

Enthusiasm for Technology: They are excited about technology and will seek out information on the latest products and innovations.

Personal Control: They feel in control of their lives and not afraid to take on moderate risk if it means they can learn something new.

Adaptability to Complexity: They are not threatened by the changes and complexities of society. In fact, they embrace complexity as a learning experience and a source of opportunity.

Bottom defining Values

Advertising as Stimulus: They are skeptical of advertising and less likely to be influenced by it.

Ostentatious Consumption: German Cultural Explorers are careful in their spending – more liable to invest in up-scale products from well-known brands.

Travel Values

A Cultural Explorer will seek:

Unstructured Travel: They prefer not to be constrained to “tourist” schedules or destinations, and will chart their own courses.

Cultural Immersion: The best way to experience a culture is to interact with it as deeply as possible.

Nature: They will choose destinations that provide opportunities to experience natural beauty.

Historical Travel: They love to learn about and absorb themselves in the ancient history, as well as the modern cultures of the places they visit.

Escape: They want to get away from it all and have a break from their responsibilities back home.

A Cultural Explorer will avoid:

Comfort-Seeking: They are not afraid to try something new or have an adventure outside of their home comforts.

Reluctant travel: They are always planning their next trip – they are not content to experience the world through the Internet or TV.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing - land based animals & bird watching
3. Visiting well-known natural wonders
4. Visiting national, provincial/State park to view wildlife and surrounding nature and/or to participate in adventure experiences
5. Seeing beautiful coastline, beaches
6. Visiting small towns, villages
7. Visiting national, provincial/State parks to visit interpretative centres/museums
8. Attending farmers' markets
9. Visiting World Heritage Sites
10. Interacting with the local inhabitants, people

3 of the Least Appealing Activities

1. Tent camping
2. Participating in multi-day organized tours by train
3. Participating in amateur sports & leisure tournaments and competitions

Last Trip

Party composition & size: Primarily two adults with no children (60%) – similar for long-haul trips (61%). Significantly higher than the German average.

Duration: The average trip length for German CEs is 15.4 nights, whereas long-haul CEs stayed slightly longer (20.6 nights).

Spend: They had an average party spend of \$2,031. Those who took long-haul trips spent much more than the German long-haul average (\$3,224 vs. \$2,882).

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Travel guides and books
3. Discussions with past visitors

Product:

- Immersive
- Active adventure over entertainment and arts & culture
- Easy and uncomplicated
- Allows free exploration rather than structured itineraries

Price:

- Discriminating consumers who will appreciate deals, coupons and promotions

German Cultural Explorers

Promotion:

- Varied and extensive media mix, heavy emphasis on websites, media relations/ unpaid media and use of technology
- Include other traveller reviews
- Social connection with locals and past visitors
- Creative and aesthetically appealing
- Showcase Western & Eastern Canada, as well as mountains for winter outdoor activities

Close the Sale!

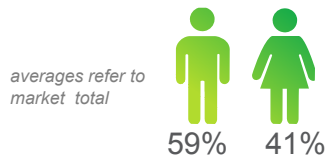
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on websites and social channels
- Make it clear how to book online or connect via phone.

Germany
Authentic Experiencers
 13% of German Market

Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek.



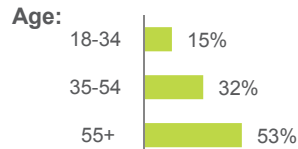
Demographics



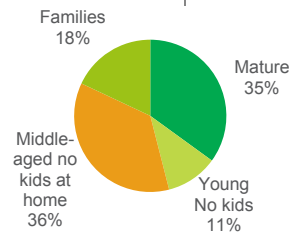
Education: Much higher than average

Employment: FT, high proportion Retirees

Household Income: Higher than average



Lifestage



Social Values

Top defining Values

Global Consciousness: They have a stronger awareness and are concerned for the welfare of others in other places on the globe.

Importance of Spontaneity: They welcome and appreciate the unexpected as a break from the routine of everyday life.

Rejection of Authority: They are critical of and will question the status quo.

Cultural Sampling: They believe that other cultures have a lot to teach them.

Bottom defining Values

Advertising as Stimulus: They are unlikely to see advertising as a reliable source of information on products – they may be less accessible through traditional advertising.

Joy of Consumption: Shopping as an activity is not their focus – they will buy decisively or give in to impulse.

Travel Values

An Authentic Experiencer will seek:

Historical Travel: They love to learn about and absorb themselves in the history and culture of the places they visit. They will research before they leave and take their time in historic sites and museums.

An Authentic Experiencer will avoid:

Checklist Travel: They are less likely to make lists or detailed itineraries to ensure that they take in all of the ‘must see’ attractions.

Shared Experience: More likely to travel in couples or alone.

Security Concern: Not fearful of their personal safety

Comparison Travel: They are likely to accept their destinations on their own merits, and not compare them to what they have at home.

Group Travel: They prefer to do their own thing.

Hedonistic Rejuvenation: Being pampered and having everything taken care of for them is not a priority.

Escape: Travel is not about escape, but about personal development and learning.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing - land based animals & bird watching
3. Seeing beautiful coastline, beaches
4. Visiting national, provincial/State parks to visit interpretative centres/museums
5. Visiting well known historic sites and buildings
6. Visiting national, provincial/State park to view wildlife and surrounding nature and/or to participate in adventure experiences
7. Dining at restaurants serving your home specialties
8. Dining at restaurants offering local ingredients
9. Visiting World Heritage Sites
10. Interacting with the local inhabitants, people

3 of the Least Appealing Activities

1. Visiting casinos
2. Participating in multi-day organized tours by train
3. Staying at a boutique hotel

Last Trip

Party composition & size: The majority of German AEs took child-free trips, on par with the German average (73% vs. 72%).

Duration: German AEs, both long-haul and total, took longer than average last trips. All German AE's took trips of 14.8 nights (vs. German average of 12.8; long-haul took 22.7 nights (vs. 17.5).

Spend: Average spend per party per trip was \$1,957 (\$105/person) for all German AEs. Long-haul travellers spent more on average (\$3,088/\$133).

Top 3 Sources for Trip Planning

1. Travel guides and books
2. Websites of online retailers, travel agencies or tour operators
3. Websites of airlines, hotels, attractions or other services at the destination

Product:

- Historical emphasis
- Less interest in festivals & events; or cruises & touring activities*
- Many lower-impact, observational activities appeal, but show love of hiking and spelunking
- Appreciate educational activities
- Authentic, living culture

Price:

- Quality is the more important consideration

German Authentic Experiencers

Promotion:

- Media relations/unpaid media are key for inspiration; as are websites, travel guides & books for planning
- Catered to older demo, more men
- Non-touristy, uncomplicated
- Less directive in tone, presents options*

Close the Sale!

- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Clear call to action on your websites with ability to book online or connect via phone.
- Airline, hotels, attraction and other service websites

**compared to the global Authentic Experiencer*

United Kingdom
Free Spirits
 13% of UK Market



Demographics

averages refer to market total

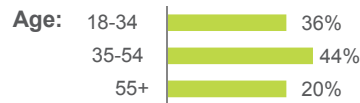


49% 51%

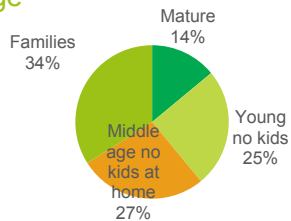
Education: Average

Employment: Most Full time; higher than avg. are students

Household Income: Lower than average



Lifestage



© 2012 Canadian Tourism Commission

Free Spirits are highly social and open-minded. Their enthusiasm for life extends to their outlook on travel. Experimental and adventurous, they bask in high-end hedonistic experiences that are shared with others.

Social Values

Top defining Values

Joy of Consumption: Despite lower than average financial security, they find shopping highly gratifying.

Importance of Brand: A brand name is an indicator of quality, style and status.

Penchant for Risk: They are confident risk-takers, secure in their ability to reach their goals no matter what obstacles they may face.

Attraction for Crowds: One of the most social of all EQ types, they are adept at networking, they enjoy large group atmospheres.

Social Mobility: Possessing the skills and education to make it happen, they are highly motivated to advance in life and work.

Bottom defining Values

Skepticism towards Advertising: Not mistrustful of societal institutions like government or big business, Free Spirits have a degree of confidence in advertising

Travel Values

A Free Spirit will seek:

Checklist Travel/Samplers: They will come prepared with a list of 'must-see' attractions rather than exploring a destination in general. Their higher concern for security will drive their affinity for group travel.

Constant Travel: They put a high priority on travel, making them an attractive target.

Comparison Travel: Love to travel – and brag about the superiority of the places they have visited

Luxury: Often aspire to stay in the most luxurious accommodations and venues.

Hedonistic Rejuvenation: Vacation is a time to be carefree and indulge – they will enjoy spa, nightlife and great cuisine and other opportunities for a little pampering.

Roots Travel: More interested in learning about their ancestral heritage.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Seeing beautiful coastline, beaches
2. Marine life viewing (whale watching, other marine life)
3. Visiting national, provincial/State park to view wildlife and surrounding nature and/or to participate in adventure experiences
4. Dining at restaurants offering local ingredients
5. Wildlife viewing - land based animals & bird watching
6. Visiting well-known natural wonders
7. Sunbathing
8. Shopping - gourmet foods in retail stores
9. Visiting aquariums/zoo's
10. Taking a day cruise

3 of the Least Appealing Activities

1. Snowshoeing
2. Skiing – Cross-Country (Nordic)
3. Attending literary festivals or events

Last Trip

Party composition & size: Majority took trips with just two adults (50%). More likely than the UK avg. to have taken children with them, particularly if their last trip was long-haul (20% vs. 17%).

Duration: Average trip duration for long-haul trips was roughly 2 weeks, which is slightly lower than the average UK long-haul trip.

Spend: All UK Free Spirits had a higher than UK average spend of \$3,337. Those who went on long-haul trips spent more (\$4,204).

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites providing traveller reviews (e.g., TripAdvisor)
3. Websites of airlines, hotels, attractions or other services at destination

Product:

- Less active participation*
- Involves the main sights
- Social events, festivals
- Multi-faceted
- Convenient

Price:

- Offers a range of options
- Provide a menu of choices

UK
Free Spirits

Promotion:

- Lively and direct
- Strong new media presence
- Fun and stylish
- Travel features on TV, radio or magazines
- Websites for airlines, hotels, attractions or other services

Close the Sale!

- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on websites and social channels
- Make it clear how to book online or connect via phone.

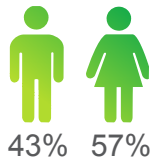
**compared to the global Free Spirit*

United Kingdom
Cultural Explorers
 10% of UK Market



Demographics

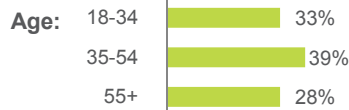
averages refer to market total



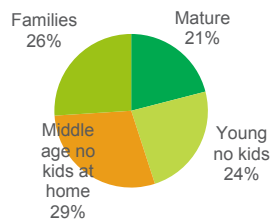
Education: Higher than average

Employment: Most full-time

Household Income: Average



Lifestage



Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Social Values

Top defining Values

Personal Challenge: They set challenging goals and finish what they start.

Pursuit of Novelty: Trying out new new products, services and experiences is thrilling!

Adaptive Navigation: They have the flexibility to change course or adapt if unforeseen events are presented to them.

Importance of Aesthetics: Will appreciate the appeal of the packaging as well as what's contained in the package.

Importance of Spontaneity: They welcome surprises and the unexpected as opportunities to add interest to their lives.

Bottom defining Values

Conformity to Norms: They like to be unique, different from others - they love to share their ideas and creativity. They don't feel the need to adhere to social conventions.

Aversion to Complexity: They have a zest for life and are not intimidated by changes or complexities in society. Being spontaneous is thrilling and fun for them.

Travel Values

A UK Cultural Explorer will seek:

Constant Travel: Always looking forward to planning and taking the next trip. Between trips they will read travel articles to inspire their future plans to visit new places.

Nature: They will choose destinations that provide opportunities to experience natural beauty.

Cultural Immersion: The best way to experience a culture is to interact with it as deeply as possible.

Unstructured Travel: Prefer not to be constrained to "tourist" schedules or destinations, and will chart their own courses.

Historical Travel: They have a strong interest in attractions with a rich historical background.

Shared Experiences: Attracted to groups where they can socialize and share the experience with others. Also enjoy social, fun experiences where they can let loose and express themselves.

A UK Cultural Explorer will avoid:

Comfort-Seeking: They don't need the comforts of home when they are travelling, but they are not averse to a little pampering.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Dining at restaurants offering local ingredients
3. Visiting small towns, villages
4. Seeing beautiful coastlines, beaches
5. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
6. Wildlife viewing - land based animals & bird watching
7. Visiting well-known natural wonders
8. Interacting with the local inhabitants, people
9. Visiting well known historic sites and buildings
10. Visiting World Heritage Sites

3 of the Least Appealing Activities

1. Geocaching
2. Golfing
3. Hunting

Last Trip

Party composition & size: The majority of UK CEs took trips with just two adults (50%).

Duration: Average number of nights was 13.9 (all trips) and 18.1 (long haul).

Spend: All UK CEs had a higher than UK average spend of \$3,168, (\$106/person per night). Those who took long-haul trips spent even more than this (\$4,351/\$130).

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites providing traveller reviews (e.g., TripAdvisor)
3. Websites of airlines, hotels, attractions or other services at destination

Product:

- Immersive
- Beautiful scenery and activities in it
- Allows free exploration
- Environmentally, socially responsible

Price:

- Will pay for unique experiences, local, sustainable, ethical products
- Seeks value for money
- Transparency of offering

UK Cultural Explorers

Promotion:

- Get people talking (friends/family)
- Varied and extensive media mix
- Include other traveller reviews
- Beautiful scenery, active adventure
- Social connection with locals
- Stylish, creative

Close the Sale!

- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Partner with airlines, hotels or services in our area.
- Include a clear 'call to action' on websites and social channels
- Make it clear how to book online or connect via phone.

**compared to the global Cultural Explorer*

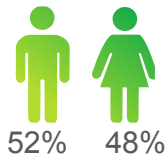
United Kingdom
Authentic Experiencers
 16% of UK Market

Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek.

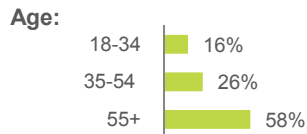


Demographics

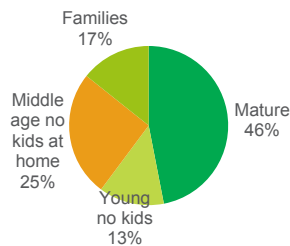
averages refer to market total



Education: Higher than average
Employment: Higher than avg. retired
Household Income: Average



Lifestage



Social Values

Top defining Values

Brand Apathy: They are not influenced by brand as an indication of quality or status.
Rejection of Order: Living with a certain amount of disorder is an expression of self – they enjoy a more informal and relaxed approach to life.
Cultural Sampling: They show a tendency to incorporate foreign cultures into their lives, like going to an Inuit art gallery or dining at a Thai restaurant.
Discount Consumerism: Lack of financial confidence makes them more likely to appreciate a discount.

Bottom defining Values

Attraction for Crowds: Big noisy gatherings hold no appeal for them.
Confidence in Small Business: With a higher rejection of authority, they are less likely to place a lot of faith in business.
Joy of Consumption: Shopping is a necessity, not a pleasure.

Travel Values

An Authentic Experiencer will avoid:

Reluctant Travel: Although they score lower than other Authentic Experiencers in specific travel motivations like historical travel, they enjoy travelling in general when they can.
Group Travel: They prefer to do their own thing.
Exhibitionism: They don't seek the centre of attention – don't look for them in nightclubs or other places where they will stand out.
Comparison Travel: They enjoy experiencing the authentic nature of the destination and are not likely to compare it with home.
Luxury Travel: They are unlikely to seek out luxury amenities or gourmet experiences.
Comfort Seeking: This EQ type does not shy away from living like the locals do. This is more important than staying somewhere with the comforts of home.
Escape: Travel is not about escape from the day to day, they need not disconnect in order to relax.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Dining at restaurants offering local ingredients
3. Visiting well-known natural wonders
4. Visiting small towns, villages
5. Visiting World Heritage Sites
6. Wildlife viewing - land based animals & bird watching
7. Visiting well known historic sites and buildings
8. Seeing beautiful coastline, beaches
9. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
10. Touring, sightseeing in rural areas

3 of the Least Appealing Activities

1. Participating in amateur sports & leisure tournaments and competitions
2. Geo-caching
3. Hunting

Last Trip

Party composition & size: The majority of UK AEs are more likely than average to have taken trips child-free (81% vs. 71%).

Duration: Mean length of long-haul trips was 16.7 nights, on par with the UK average.

Spend: All UK AEs had a slightly higher spend per trip (\$3,017) than average, although the long-hauler's mean spend per night was on par with other EQ types (\$149 vs. \$147).

Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at the destination
2. Travel guides and books
3. Websites of online retailers, travel agencies or tour operators

Product:

- Not as much historical emphasis*
- Low-impact, observational activities
- Authentic, living culture
- Less group-oriented*

Price:

- Price-sensitive; respond to discounts

UK Authentic Experiencers

Promotion:

- Traditional media and Internet websites of Regional, City or National tourism offices
- Include practical details
- Catered to older demo
- Non-touristy
- Like travel guides and books

Close the Sale!

- Partner with airlines, hotels or services in your area.
- Make it clear how to book online or connect via phone.
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on websites

**compared to the global Authentic Experiencers*

US

Free Spirits

14% of US Market



Demographics

averages refer to market total

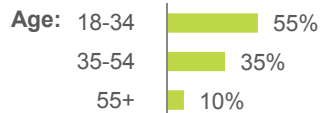


49% 51%

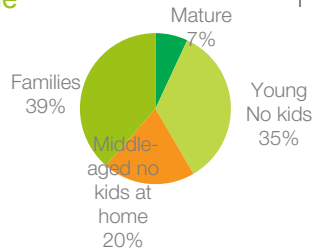
Education: Average

Employment: Most FT, highest proportion of students & unemployed

Household Income: Higher than average



Lifestage



Social Values

Top defining Values

Importance of Brand: A brand name is an indicator of quality, style and status.

Joy of Consumption: Love to shop! Free Spirits find shopping highly gratifying, but they are not impulsive.

Penchant for Risk: They are confident risk-takers, secure in their ability to reach their goals no matter what obstacles they may face.

Attraction for Crowds: Their social nature leads them to enjoy large group atmospheres.

Discerning Hedonism: They savor pleasures and appreciate complex emotions.

Bottom defining Values

Discount Consumerism: They will not sacrifice quality for price. All things being equal, they may choose smaller operators over bigger ones if they offer better value for money.

Aversion to Complexity: They don't feel threatened by the changes in society today – rather, they see them as opportunities for learning.

Travel Values

A Free Spirit will seek:

Comparison Travel: They love to travel – and brag about the superiority of the places they have visited

Luxury: They often aspire to stay in the most luxurious accommodations and venues.

Exhibitionism: They enjoy being the centre of attention and will dance the night away in a nightclub.

Shared Experiences: Free Spirits are attracted to groups where they can socialize and share the experience with others – using social media for sharing during and after the trip.

Samplers: They want to see all the main attractions, but not in depth – they will employ detailed itineraries, ensuring that they don't miss anything!

Hedonistic Rejuvenation: Vacation is a time to be carefree and indulge – they will enjoy spa, nightlife and great cuisine and other opportunities for a little pampering.

A Free Spirit will avoid:

Reluctant travel: Free Spirits are always planning their next trip – they are not content to experience the world through the Internet or TV.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
3. Seeing beautiful coastline, beaches
4. Staying at a waterfront resort
5. Dining at restaurants offering local ingredients
6. Swimming, tubing, waterskiing, etc.
7. Visiting aquariums/zoos
8. Wildlife viewing - land based animals & bird watching
9. Food related factory tours (Cheese, chocolate, etc.)
10. Visiting national, provincial/State parks to visit interpretative centres/museums

3 of the Least Appealing Activities

1. Dog sledding
2. Farm stays
3. Snowshoeing

Last Trip

Party composition & size: More likely than average to have travelled in groups of 2 adults with children on all trips.

Duration: Most US FSs took trips of about a week (6.9 nights). Long haul trips were slightly longer (9.5 nights).

Spend: The typical party spend for all US FS was a higher than average \$2,732 (vs. \$2,121), or \$149 per person per night. Those who travelled long-haul typically spent more (\$4,005 per trip or \$188 per person per night), but within the long-haul average.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at destination
3. Discussions with friends, family, business colleagues

Product:

- Provide opportunities for travellers to express themselves outwardly and in an unrestrained manner
- Minimize any discomfort or differences from the American way of life
- Provide group activities
- Emphasize safety and security
- They will have greater appreciation for city activities (like sightseeing, shopping, dining) & active adventure *
- Include some independent travel mixed with some tours and/or semi-inclusive packages

Price:

- They are not particularly price-sensitive, so a range of travel budget/costs (fitting of the travel experience) will be accepted by this group

US Free Spirits

Promotion:

- Reach out to both the younger, single audience and the young family audience
- Play up opportunities to brag and have fun
- Emphasize comfort and ease over anything too 'off the beaten track' and unfamiliar
- Demonstrate safety and security
- Leverage heavy social media presence, as well as websites of services at destination

Close the Sale!

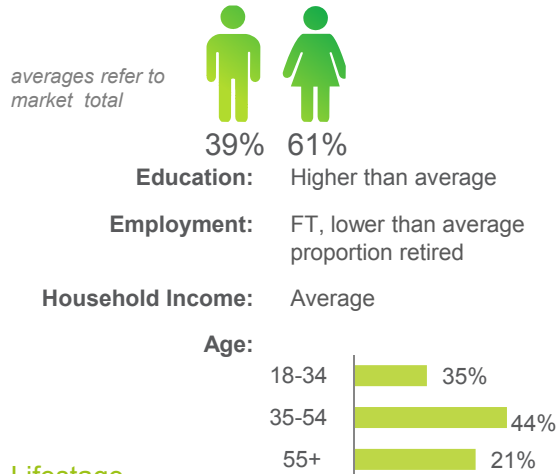
- Be active in Social Media (Facebook & Twitter) with strong 'call to actions'.
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Partner with airlines, hotels, attraction and services in your area
- Make it clear how to book online or connect via phone

**compared to the global Free Spirit*

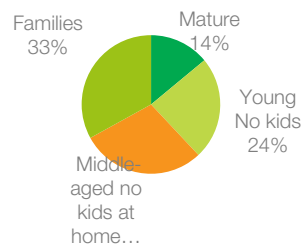
US
Cultural Explorers
 9% of US Market



Demographics



Lifestage



Cultural Explorers are defined by their love of constant travel and continuous opportunities to embrace, discover and immerse themselves in the culture, people and settings of the places they visit.

Social Values

Top defining Values

- Personal Challenge:** They like to test their limits both at work and at play.
- Social Mobility:** They strive for personal success at work and in society – more than their global counterparts.
- Personal Escape:** A high-pressure lifestyle may mean a greater desire to escape when travelling.
- Confidence in Small Business:** Unlike their global counterparts, they believe business deliver on quality and service.
- Celebrating Passages:** They will celebrate life's significant events, like births, marriages etc. This may relate to the US CE's higher emphasis on the family – they may be attracted to family-friendly destinations.

Bottom defining Values

- Buying on impulse:** They enjoy shopping, are more brand conscious, but will take their time and shop for bargains.
- Aversion to Complexity:** They are not intimidated by changes or complexities in society.

Travel Values

A Cultural Explorer will seek:

- Cultural Immersion:** The best way to experience a culture is to interact with it as deeply as possible.
- Historical Travel:** They love to learn about and absorb themselves in the ancient history, as well as the modern cultures of the places they visit.
- Constant Travel:** always looking forward to planning and taking the next trip.
- Unstructured Travel:** They prefer not to be constrained to "tourist" schedules or destinations, and will chart their own courses.
- Nature Travel:** They will choose destinations that provide opportunities to experience natural beauty.

Shared Experiences: They are attracted to groups where they can socialize and share the experience with others – using social media for sharing during and after the trip.

A Cultural Explorer will avoid:

- Comfort-Seeking:** This EQ type seeks an authentic experience and doesn't need to be pampered in commercial hotels.
- Luxury Travel:** They may indulge in food and drink and live it up when travelling, but they don't necessarily need luxury.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Visiting aquariums/zoos
2. Marine life viewing (whale watching, other marine life)
3. Visiting well-known natural wonders
4. Dining at restaurants offering local ingredients
5. Attending museums
6. Wildlife viewing - land based animals & bird watching
7. Visiting national, provincial/state parks to view wildlife and surrounding nature and/or to participate in adventure experiences
8. Visiting small towns, villages
9. Seeing beautiful coastline, beaches
10. Visiting well known historic sites and buildings

3 of the Least Appealing Activities

1. Snowmobiling as an overnight touring trip
2. Golfing
3. Hunting

Last Trip

Party composition & size: The majority travelled child-free on last trip (73%). This is also true of those who travelled long-haul.

Duration: All US Cultural Explorers typically took trips just over a week. Long-haul travellers stayed longer, with an typical duration of 11.1 nights.

Spend: Average party spend is \$2,443 per trip, \$162/person/night. More was spent on long-haul trips - \$3,597 (\$195 per person/night) but is inline with US long-haul average.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at destination
3. Websites of regional or city tourism offices

Product:

- Greater interest in all activity categories except winter outdoor activities*
- Provide opportunities for show off and exhibitionism
- More focused for slightly younger audience, and some kid-friendly activities*
- Greater need for escape and desire for hedonistic rejuvenation

Price:

- Discriminating consumers who will appreciate deals, coupons and promotions

US Cultural Explorers

Promotion:

- Varied media mix, with planning more focused on Websites.
- Word-of-Mouth advocacy is influential
- Approachable, authentic and but not as low-key
- Include more reference to brand*
- Highlight vibrant cities, as well as award-winning cuisine, in addition to connecting with locals
- Emphasize opportunities to de-stress and unwind, as well as the chance to let loose & be social

Close the Sale!

- Be active in Social Media (Facebook & Twitter) with strong 'call to actions'.
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Partner with airlines, hotels, attraction and services in your area
- Make it clear how to book online or connect via phone

**compared to the global Cultural Explorer*

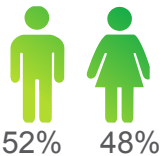
US

Authentic Experiencers

11% of US Market



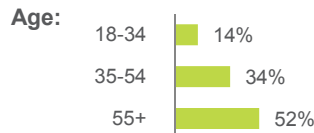
Demographics



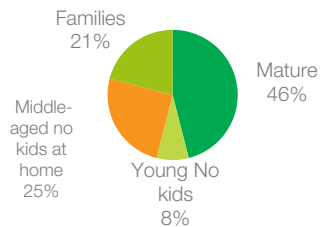
Education: Higher than average

Employment: FT/ Higher than avg. are retired

Household Income: Higher than average



Lifestage



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Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with a focus on their history and culture.

Social Values

Top defining Values

Religiosity: interested in their spiritual well-being. This also extends to their own personal health.

Everyday Ethics: They are more likely to strive to do right by the people around them.

Saving on Principle: Financially cautious, they are more likely to take financial precautions and will seek value for money when they shop.

Personal Control: They are focused on maintaining control and autonomy in their lives. Many are retired, with time to do the things they want to do.

Cultural Sampling: They show a tendency to incorporate foreign cultures into their lives, like going to an Inuit art gallery or dining at a Thai restaurant.

Bottom defining Values

Importance of Brand: They don't see brand as the primary indicator of quality or value. They have a greater preference for mom and pop operations.

Joy of Consumption: Although they are relatively affluent and confident financially, they shy away from ostentatious consumption.

Travel Values

An Authentic Experiencer will seek:

Historic Travel: They love to learn about and absorb themselves in the history and culture of the places they visit. They will research before they leave and take their time in historic sites and museums. They also have an interest in finding out about their own ancestry.

Cultural Immersion: They are more likely than their global counterparts to view travel as an opportunity to connect with others

An Authentic Experiencer will avoid:

Comparison Travel: This EQ type does not shy away from living like the locals do and is unlikely to be constantly comparing the destination to the comforts of home.

Group Travel: They prefer to do their own thing.

Escape: Travel is not about escape from the day to day, they need not disconnect in order to relax.

Hedonistic Rejuvenation: They are unlikely to be carefree and indulgent when traveling – their focus is on learning

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing - land based animals & bird watching
3. Dining at restaurants offering local ingredients
4. Seeing beautiful coastline, beaches
5. Visiting well known historic sites and buildings
6. Visiting well-known natural wonders
7. Visiting national, provincial/State park to view wildlife and surrounding nature and/or to participate in adventure experiences
8. Attending museums
9. Mountain and Glacier viewing
10. Visiting small towns, villages

3 of the Least Appealing Activities

1. Participating in amateur sports & leisure tournaments and competitions
2. Motorcycling
3. Snowmobiling as an overnight touring trip

Last Trip

Party composition & size: Over half (52%) took trips with just two adults (increases to 53% for long-haul travel).

Duration: On average, all US AE's took trips of 8.6 nights. Long-haul duration was longer (10.3 nights), on par with the average.

Spend: They have a higher than average trip spend of \$2,693 – may be due to their longer trip duration (long haul is \$4,473). Per person spend is average at \$214.

Top 3 Sources for Trip Planning

1. Websites of airlines, hotels, attractions or other services at destination
2. Websites of online retailers, travel agencies or tour operators
3. Travel guides and books

Product:

- Allow them to engage in historical travel, cultural immersion and exploring their roots.
- Allow visitor to sample the main sights, as well as go off the beaten track
- Create opportunities for shared experiences

Price:

- Reasonable
- Deals and discounts will appeal

US
Authentic
Experiencers

Promotion:

- Word-of-Mouth, magazine and newspaper articles for inspiration, heavy do-it-yourself planners through websites of online retailers and hotels/attractions at destination
- Practical details and some creative and expressive elements
- May be more open to travel technology, apps, etc.*

Close the Sale!

- Partner with airlines, hotels, attraction and services in your area
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!
- Include a clear 'call to action' on your website
- Make it clear how to book online or connect via phone

*compared to the global Authentic Experiencer

Mexico
Free Spirits
 15% of Mexican Market



Demographics

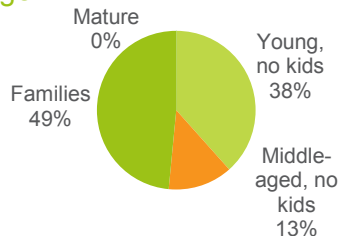
averages refer to market total



39% 61%

- Education:** Mainly university & post-graduate
- Employment:** Slightly higher than average full time
- Household Income:** Higher than average
- Age:**
 - 18-34 67%
 - 35-54 29%
 - 55+ 4%

Lifestage



Free Spirits have an enthusiasm for life that is evident in how they travel. They are highly social and open-minded, experimental and adventurous. In addition, they embrace nature, culture and history, and love opportunities to share their experiences.

Social Values

Top defining Values

- Penchant for Risk & Personal Challenge:** They take risks to reap possible rewards and they strive continuously to achieve the goals they set for themselves.
- Financial Security, Social Mobility, Need for Status Recognition:** They take care to ensure that their personal finances and social status are respectable and while they feel good about their future, they are driven to improve their lot in life and be recognized for it.
- Joy of Consumption, Ostentatious Consumption, Importance of Brand:** They love to shop and place high value on products and services that render them “high class”.
- Pursuit of Novelty:** They love trying new products, services and experiences.
- Confidence in Small Business, Selective Use of Professional Services:** They are slightly more supportive of small operators than big business, though they rely heavily on the guidance of experts to help them find goods and services that meet their needs.

Bottom defining Values

- Conformity to Norms:** They are not afraid to challenge the status quo for something they strongly believe in.
- Anomie-Aimlessness:** They seldom feel lost or purposeless about life.

Travel Values

A Free Spirit will seek:

- Nature Travel:** They want to be awe-struck by the sheer beauty of nature, lands, mountains and wildlife.
- Shared Experiences:** They enjoy sharing travel memories because it lets them re-live special moments. This gives rise to a preference for group travel, as they enjoy talking to others about their day.
- Escape:** They look for ways to relax, to disconnect and temporarily forget about their responsibilities at home. This is linked to another value, Hedonistic Rejuvenation– the desire to be pampered. For some, relaxation is best achieved with unstructured travel.
- Samplers:** They have broad interests and will seek to sample all the great things a destination has to offer including culture and history.
- Security:** They are always on their guard about personal safety, so attention to security is important while travelling - they need to know they are safe to truly have a relaxing and worry-free vacation.

A Free Spirit will avoid:

- Comfort:** They are capable of adjusting to new surroundings; comfort and luxury will not be rejected, but are not a requirement.
- Checklist and Comparison Travel:** They feel no need to compare everything they see to their life at home, or to make long lists of things to do.

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Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Zip-trekking/bungee jumping
2. Marine life viewing (whale watching, other marine life)
3. Wildlife viewing - land based animals & bird watching
4. Seeing autumn leaves
5. Wildflowers/flora viewing
6. Visiting botanical gardens
7. Visiting national, provincial/state park to view wildlife and surrounding nature and/or to participate in adventure experiences
8. Horseback riding
9. All-terrain vehicle use
10. Shopping - gourmet foods in retail stores

3 of the Least Appealing Activities

1. Staying at a waterfront resort
2. Taking a cruise
3. Visiting well-known natural wonders

Last Trip (Long Haul)

Party composition & size: Largest portion, and more likely than the average to have travelled in groups of 3+ adults.

Duration: Most Mexican FSs took trips of 4-7 nights (similar to average); slightly more than average took a trip of 8-14 nights. Average duration 9.6 nights.

Spend: Almost one-third, slightly more than the Mexican average spent \$1,000-1,999. An equal share spent \$2,000-2,999. Average party spend for FS (\$2,822) was in line with the Mexican average.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at destination
3. Websites providing traveller reviews

Product:

- Offer active adventure experiences such as water-based outdoor sports in the summer and outdoor activities in the winter.
- Where possible tie-in the opportunity to do things in and around nature.
- Promote activities that invite immersion in Canadian culture, like culinary experiences, festivals, sporting events and opportunities for engagement with Canadian music, arts, food, history and First Nations' spirituality.
- Make tours and packages available (i.e., guided tours and semi-inclusive resort stays).

Price:

- Make products affordable to attract more spending overall.
- Highlight high-quality products that are backed by well-known brands – Mexican Free Spirits may be willing to pay more for quality.

Mexican Free Spirits

Promotion:

- Keep Web sources up-to-date and interactive.
- Cater slightly towards female travellers.
- Highlight "must-see" experiences.
- Promote safety.
- Convey unique and highly energetic cultural experiences.

Close the Sale!

- Present traveller reviews and link to 3rd party review sites.
- Ensure your experience is well promoted on 3rd party websites.
- Be active in social media and make it easy for them to post.
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!

**compared to the Global Free Spirits while taking into consideration the Market Average*

Mexico
Cultural History Buffs
 10% of Mexican Market



Demographics

averages refer to market total



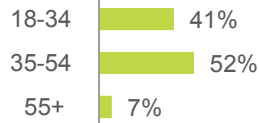
43% 57%

Education: Higher than average; highest for post-grad

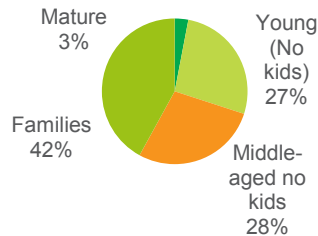
Employment: Mainly full time

Household Income: Average

Age:



Lifestage



Social Values

Top defining Values

Personal Control, Time Stress, Personal Escape: Their need for control combined with feeling time stressed may make life seem overwhelming at times, resulting in the need to escape; this likely extends to their travels.

Ecological Concern, Ethical Consumerism: They are concerned about the state of the environment, as well as individuals' and industry's disregard for their roles. They apply this view when making purchase decisions.

Confidence in Big and Small Business, Confidence in Advertising, Discriminating Consumerism, Selective Use of Professional Services: They are receptive to both large and small businesses, and are more trusting of advertising, yet place a high value on thoroughly researching their purchases and obtaining advice from experts.

Bottom defining Values

Ecological Fatalism: They refuse to accept that there is a necessary trade-off between the environment and economic advancement.

Traditional Family, Sexism: They are understanding of all others and reject that a family and men and women should look and behave in traditional ways.

Anomie-Aimlessness: They seldom feel lost or purposeless about life.

Travel Values

A Cultural History Buff will seek:

Historical & Roots Travel: These travellers want to learn about themselves and others; to gain a deeper understanding of the experiences of those before them by visiting the places they have read so much about.

Nature Travel: They appreciate and want to see natural settings.

Cultural Immersion: These travellers derive pleasure from doing, not just seeing. They want to experience life the way locals do no matter how uncomfortable it might be.

Unstructured Travel: they enjoy spontaneity and stumbling across hidden gems – travel should consist of adventure, discovery and exploration.

Escape: When setting out on adventures and new life experiences, they are looking to leave their everyday life behind.

A Cultural History Buff will avoid:

Luxury Travel, Comfort-Seeking: These travellers look to broaden their horizons through travel, and do not require five-star accommodations or other luxuries.

Checklist Travel: They do not need to hit all the "must-see" sights and are comfortable with a relaxed itinerary.

Comparison Travel: They will view new experiences as having a positive, enriching impact on their lives; not comparing them to life at home.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Wildlife viewing – land based animals & bird watching
2. Marine life viewing (whale watching, other marine life)
3. Wildflowers/flora viewing
4. Visiting national, provincial/state parks to visit interpretative centres/museums
5. Seeing autumn leaves
6. Visiting botanical gardens
7. Visiting national, provincial/state park to view wildlife and surrounding nature and/or to participate in adventure experiences
8. Zip-trekking/bungee jumping
9. Attending performing arts – theatre/musical
10. Hiking – same day excursion while on a trip of 1+ night

3 of the Least Appealing Activities

1. Viewing northern/southern lights/aurora
2. Taking a cruise
3. Visiting religious monuments and buildings

Last Trip (Long Haul)

Party composition & size: The majority travelled child-free on last trip (80%). More likely than average to travel alone or with one other adult (especially alone).

Duration: Higher than average for taking a trip of 15-21 and 22+ nights. Typical duration of 11.1 nights (vs. 9.1 Mexican average).

Spend: Average party spend at \$2,608 is higher than Mexican average of \$2,559.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at destination
3. Websites providing traveller reviews

Product:

- Showcase the diversity and uniqueness of our landscape, people and cuisine.
- Showcase Canada's native and Western European roots.
- Put greater emphasis on active adventure – in particular as related to parks, and winter and water activities.
- Learning opportunities focused on adults over kid-friendly activities.

Price:

- Keep it reasonable and competitive with Western Europe.
- High-price add-ons and luxury accommodations are less likely to appeal.

Mexican Cultural History Buffs

Promotion:

- Focus on using traditional travel advertising sources and media relations/unpaid media.
- Include more of a social media and online presence than would normally be done for a Cultural History Buff.
- Highlight some key sights, as well as propose some ideas for multi-destination trips.
- Underscore how coming to Canada would be a new experience, and that we have a rich diversity of people, culture and history to explore – closer than going to Europe.

Close the Sale!

- Present traveller reviews and link to 3rd party review sites.
- Ensure your experience is well promoted on 3rd party websites.
- Be active in social media and make it easy for them to post.
- Travel agencies, travel operators and tour guide websites are sales channels – make sure where possible you are listed!

**compared to Global Cultural History Buffs while taking into consideration the Market Average*

Mexico

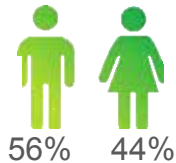
Authentic Experiencers

11% of Mexican Market



Demographics

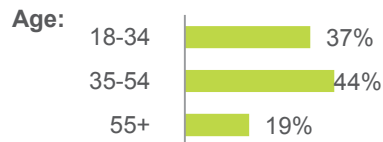
averages refer to market total



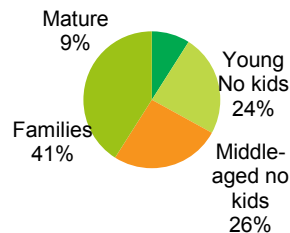
Education: Higher than average; 2nd highest post-grad

Employment: Mainly full time; highest share retired

Household Income: Slightly above average



Lifestage



Social Values

Top defining Values

Consistent Self, Social Mobility, Personal Control: They tend to stay true to their values and convictions; not easily swayed by the opinion of others around them.

Ecological Concern, Global Consciousness: They believe people and companies should take action to counter environmental issues.

Discriminating Consumerism, Saving on Principle: They will carefully evaluate a product's value and quality, as well as their personal need for the product, before they make a purchase – saving is important as a future safeguard.

Brand Apathy, Skepticism towards Advertising: They are not overly concerned about brands and materialistic goods, and are hesitant to trust what the media say.

Bottom defining Values

Voluntary Simplicity: They have little willingness to scale back material expectations or sacrifice personal beliefs in order to have a simpler life.

Intuition and Impulse: They understand and interact with the world through controlled and critical rational thought, not by connecting with their emotions and feelings.

Buying on Impulse and Ostentatious Consumption: They are careful consumers with little need to impress others.

Travel Values

An Authentic Experiencer will seek:

Historical Travel: They are fascinated by the history of a place and they look for key historic sites and museums to spend time in.

Cultural Travel: They want to interact with the local life as deeply as possible – people, food, locations and architecture – live as a local.

Unstructured Travel, Sampling: They look for ways to absorb valuable knowledge through unrushed quality time at a location, yet they are anxious to see many “must-see” things/locations (just on their own time).

Nature: They also seek out and appreciate natural wonders. It is important that they find ways to interact and engage with nature by seeing open spaces and wilderness.

Shared Experiences: They want to spend time with others with similar experiences.

An Authentic Experiencer will avoid:

Escape: They are not looking at travel in order to get away from their responsibilities / real life.

Comparison Travel: These travellers will view new experiences as having a positive, enriching impact on their lives versus constantly comparing these new experiences to life at home.

Comfort and Luxury: A comfortable and luxurious holiday experience will not be rejected, but these are far from being the most important travel needs.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Wildlife viewing - land based animals & bird watching
2. Marine life viewing (whale watching, other marine life)
3. Seeing autumn leaves
4. Visiting botanical gardens
5. Visiting national, provincial/state park to view wildlife and surrounding nature and/or to participate in adventure experiences
6. Wildflowers/flora viewing
7. Shopping - gourmet foods in retail stores
8. Zip-trekking/bungee jumping
9. Visiting national, provincial/state parks to visit interpretative centres/museums
10. Sunbathing

3 of the Least Appealing Activities

1. Viewing northern/southern lights/aurora
2. Visiting well-known natural wonders
3. Taking a cruise

Last Trip (Long Haul)

Party composition & size: Largest portion, and more likely than the average to have travelled in groups of 3+ adults.

Duration: Most travelled 4-7 nights, but above average share travelled 8-14 nights resulting in a slightly higher average duration (9.7 nights).

Spend: They have only a slightly higher than average trip spend of \$2,690.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Websites of airlines, hotels, attractions or other services at destination
3. On-line travel advertising

Product:

- Gather attractions and activities that appeal to those with a marked interest in historical travel.
- Recommend activities that are educational.
- Highlight culturally engaging experiences in entertainment, accommodation and activities.
- Promote physically engaging outdoor sports, adventures and pursuits.
- Where possible tie in to the unique Canadian landscape.

Price:

- Emphasize high quality and good value for money.
- Value is correlated with the level of educational worth they perceive an experience to carry.
- Discounts and brand names are not likely to resonate, as well as quality and value.

Mexican Authentic Experiencers

Promotion:

- Leverage opportunities for coverage on Traditional Travel Advertising sources (TV, radio shows, magazines, newspapers).
- Give past visitors memorable experiences and tokens to take home to advocate positive experiences in Canada.
- Leverage mobile apps, websites with travellers reviews and social media platforms.
- Target their desire for quality and value for money, as well as history, culture and nature.

Close the Sale!

- Present traveller reviews and link to 3rd party review sites. If possible link them to past visitors.
- Make it easy to book through your website and ensure you are listed on RMO/DMO websites.

**compared to global Authentic Experiencers while taking into consideration the Market Average*

China

Free Spirits

17% of Chinese Market



Demographics

averages refer to market total



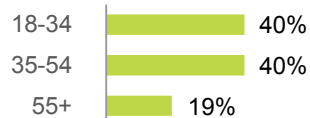
52% 48%

Education: Mainly University/College

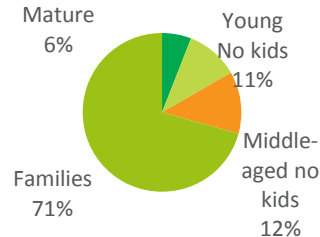
Employment: Slightly higher full time

Household Income: Highest of Chinese types

Age:



Lifestage



Social Values

Top defining Values

Financial Security: They are confident about their current wealth and future prosperity. This is due to their high **Social Mobility** – they believe social advancement is possible with hard work.

Enthusiasm for Technology and Pursuit of Novelty: They are fascinated by the latest technology, products and services.

Confidence in Advertising: They are receptive to advertisements and not as likely to scrutinize ads and brands promoted by marketers.

Fashion Trends, Importance of Brand and Need for Status Recognition: They like to have the latest styles and products and believe that having them will enhance their image.

Holistic Health, Spiritual Quest, Importance of Aesthetics and Concern for Appearance: They are attentive to the well-being of their mind, body and soul. Things such as beauty, health and lifestyle are important for these travellers.

Attraction to Crowds: They enjoy being in large crowds as a means of connecting with others.

Bottom defining Values

Discount Consumerism: They have little interest in private labels and discounts.

Saving on Principle: They do not believe in denying themselves luxuries in order to save for their future.

Travel Values

A Free Spirit will seek:

Opportunities to Show Off and have **Shared Experiences:** Being able to show off is an important aspect of travel for these travellers. They want to visit celebrated landmarks and locations, do brag-worthy activities and have exciting stories to tell when they go home. They relish in opportunities for memorable travel experiences that they can talk about and share with those they care about.

Ways to engage in **Cultural Immersion, Nature, Hobbies and Roots:** They take pleasure in learning about local culture in the destinations they visit and reconnecting with their roots and histories. It is fulfilling for these travellers to learn new things, experience different cultures and explore new interests.

Exhibitionism, Hedonistic Rejuvenation and Luxury: Vacations are a time to be more indulgent and carefree than life at home; therefore Chinese Free Spirits will aspire to stay at luxurious accommodations and venues, and will look for experiences that let them act in vibrant, expressive ways.

A Free Spirit will avoid:

Comfort-seeking and Security Concern: They have no issue taking local transportation or eating food that may not be what they are used to at home. They are unlikely to worry about being harmed while travelling.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Visiting amusement/theme parks
3. Visiting national, provincial/state parks to visit interpretative centres/museums
4. Wildlife viewing – land-based animals & bird watching
5. Visiting well-known natural wonders
6. Visiting national, provincial/state park to view wildlife and surrounding nature and/or to participate in adventure experiences
7. Seeing beautiful coastline, beaches
8. Visiting aquariums/zoos
9. Visiting World Heritage sites
10. Shopping – clothing or jewellery (brand names)

3 of the Least Appealing Activities

1. Participating in multi-day organized trips by train
2. Motorcycling
3. Participating in vocational learning

Last Trip (Long Haul)

Party composition & size: More likely than average to have travelled in groups of 2 adults or 3+ adults with children.

Duration: Half took trips of 4-7 nights though Chinese FS are more likely than average to have taken an 8-14 nights trip. Average 8.7 nights.

Spend: Spent the most as a party on their last trip. On average, FS spent \$6,337 vs. Chinese average of \$5,227. On average Chinese FS spend \$117 per person, per night.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Travel guides and books
3. Websites providing traveller reviews

Product:

- Focus on well-known landmarks and experiences that are iconic – capitalize on their desire to show off.
- Provide opportunities to shop and find gifts to take back home.
- Provide group activities and foster social connection and cohesion between group members and with guide/host, etc.
- Emphasize unique cultural features.
- Opportunity for some independent travel mixed with tours/semi-inclusive packages.

Price:

- They are not particularly price-sensitive, so a range of travel costs (fitting of the travel experience) will be accepted by this group.
- Chinese Free Spirits are the most well-off Chinese EQ Type, and are probably less price-sensitive and a little more likely to toss their money around than the Global Free Spirit. They value luxury travel and upscale consumerism. Discounts are not likely to impress them.

Chinese Free Spirits

Promotion:

- Heavy social media and website presence.
- Include some everyday cultural experiences, in addition to famous landmarks and iconic experiences.
- Emphasize luxury, indulgence and exploration of new things.
- Must be trendy and fashionable.

Close the Sale!

- Present traveller reviews and link to 3rd party review sites.
- Make it easy for them to book by linking to travel agencies / tour operators.
- Ensure your experience is well promoted by local tour operators and through websites and traditional travel advertising.

**compared to Global Free Spirits while taking into consideration the Market Average*

China
Cultural Explorers
 8% of Chinese Market



Demographics

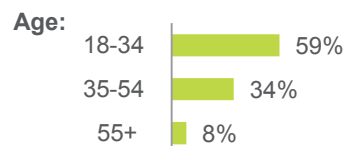
averages refer to market total



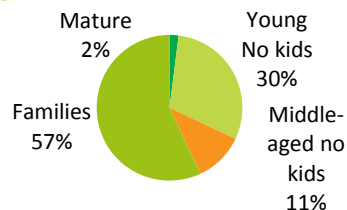
Education: Higher than average post grad

Employment: Mostly full time

Household Income: Somewhat higher



Lifestage



***Cultural Explorers** are enthusiastic about nature and culture. They are passionate explorers and eager to seek out opportunities to experience first-hand the culture, history and natural wonders of the places they visit.*

Social Values

Top defining Values

Selective Use of Professional Services: They have faith in professionals and experts, as well as large businesses.

Financial Security, Social Mobility: Confident and driven, Chinese CE's have an eye for getting ahead financially and socially. Travelling is a reward for hard work.

Fashion Trends, Importance of Brand, Need for Status Recognition: They like to have the latest styles and products and believe that having them will enhance their image.

Enthusiasm for New Technology: They are passionate about technology because it allows them to feel connected to the world and to others. Sharing pictures and messages with their family and friends back home when they travel is highly important to them.

Celebrating Passages, Social Intimacy: They embrace celebratory moments in life – weddings, anniversaries, accomplishments as it provides them with opportunities to have fun and connect with others.

Attraction to Crowds: They enjoy being in large crowds as a means of connecting with others.

Bottom defining Values

Saving on Principle: They do not believe in denying themselves luxuries in order to save for their future.

Travel Values

A Cultural Explorer will seek:

Nature: Want to experience nature and everything that the untouched natural world has to offer.

Escape: They want to disconnect from their everyday responsibilities.

Hobbies: They will travel to explore their hobbies, including taking skills courses, or attending music festivals and museums.

Cultural Immersion, Historical Travel: As learners, they are keen to absorb cultural and historical knowledge.

Shared Experiences: Looking to share fun, rich experiences with others.

Unstructured Travel: Love the discovery experience that comes from being spontaneous.

Show Off: Travelling is more fun when one can brag about it to family and friends later.

Hedonistic Rejuvenation: Being pampered and indulged will enhance their experience.

A Cultural Explorer will avoid:

Group Travel: They do not enjoy being confined by inflexible group travel styles. They will avoid touristy sites.

Exhibitionism: They are more content with paced diversions; need not go clubbing all night.

Comfort Seeking: They are willing to step out of their comfort zone to experience travel authentically.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Wildlife viewing – land-based animals & bird watching
3. Agri-touring (visiting farms)
4. Visiting national, provincial/state parks to visit interpretative centres/museums
5. Dining at restaurants offering local ingredients
6. Visiting national, provincial/state park to view wildlife and surrounding nature and/or to participate in adventure experiences
7. Visiting World Heritage sites
8. Visiting well-known natural wonders
9. Shopping – gourmet foods in retail stores
10. All-terrain vehicle use

3 of the Least Appealing Activities

1. Participating in paid city day tours (guided/non-guided)
2. Participating in multi-day guided group tours by bus
3. Participating in multi-day organized tours by train

Last Trip (Long Haul)

Party composition & size: More likely to travel as 2 adults (35%). 10% travel as groups of 2 adults with children.

Duration: Most took trips of 4-7 nights followed by 8-14; similar to the Chinese average – but slightly higher than the average for trips of 22+ days. Typical duration of trip was 9.3 nights.

Spend: On average spend 2nd highest amount per party (\$5,765) and have the highest average yield, compared to other Chinese EQ types (\$151 vs. \$106/person).

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Travel guides and books
3. Websites providing traveller reviews

Product:

- Focus on selling scenic landscapes, trails and opportunities to be close to nature.
- Emphasize unique cultural features and opportunities to interact with local people.
- Offer a variety of hobby, food and cultural experience sampling.
- Capitalize on their interest in award-winning cuisine.
- Capitalize on their desire to show off by offering unique opportunities and tokens they can take home and share with family and friends.

Price:

- Offer a range of prices – while they are willing to spend, they are not as wealthy and not as lavish spenders as Chinese Free Spirits.
- They are willing to spend more per person than the Chinese average, but are conscious about what they spend money on, so a reasonable and balanced price point is important in motivating them to spend on the things they value.

Chinese Cultural Explorers

Promotion:

- Leverage social networking websites and provide a strong social media and Internet presence so that advocacy and referrals have a greater impact.
- Keep Websites current, up-to-date and interactive and use earned media to broadcast stories about your experience.
- Emphasize unique cultural features and incorporate multicultural experiences, such as visits to Chinatowns, for those who may be interested in seeing the lives of their national counterparts overseas.

Close the Sale!

- Present traveller reviews and link to 3rd party review sites.
- Make it easy for them to book by linking to travel agencies / tour operators.
- Ensure your experience is well promoted by local tour operators and through websites and traditional travel advertising.

**compared to global Cultural Explorers while taking into consideration the Market Average*

China

Aspiring Escapists

20% of Chinese Market



Demographics

averages refer to market total

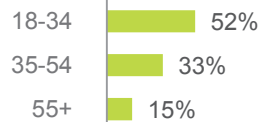


Education: Mainly university/college

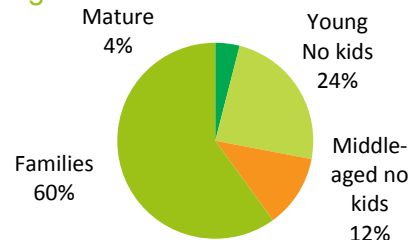
Employment: Highest share full time

Household Income: Above average

Age:



Lifestage



Social Values

Top defining Values

Financial Security, Social Mobility: They are confident about their current wealth and future prosperity and social advancement is possible with hard work.

Importance of Aesthetics, Fashion Trends, Importance of Brand, Ostentatious Consumption, Saving Face: They like to have the latest styles and products and believe that having them is the way to look good to others.

Everyday Rage, Time Stress, Fatalism and Anomie-Aimlessness: Their lifestyles would seem to be busy and hectic (ties to low Personal Control).

Voluntary Simplicity: While they enjoy the luxury that money can buy, they crave a healthier balance of quality vs. quantity in life. They want to scale back material expectations to achieve happiness through simpler means.

Bottom defining Values

Saving on Principle & Discount Consumerism: They do not believe in denying themselves luxuries in order to save for their future, nor do they feel the need to purchase on sale or private brands.

Duty, Social Responsibility – they are likely to want to fulfill their own personal pleasures before attending the needs of others.

Importance of Spontaneity: They do not embrace the unexpected, possibly because they have a low sense of personal control.

Travel Values

An Aspiring Escapists will seek:

Comfort and Luxury: When they travel, they want the environment abroad to be as comfortable and familiar as possible.

Safety: They look for destinations that make them feel safe.

Exhibitionism: They're looking to let go of tension – occasions to go out and dance or participate in active adventures are preferred ways for them to let loose.

Escape: They seek opportunities to get away from their everyday routines.

Show Off: They want their trips to be worth their time by seeing things that are unique, giving them something to share and talk about to their family, friends, and colleagues back home.

Checklist Sampling: Trips are more satisfying when they can sample all of the things they want to see and do at a particular destination.

An Aspiring Escapist will avoid:

Hedonistic Rejuvenation: While they are looking to escape, they are not looking to over-indulge.

Nature and Historic Travel: They are not seeking to spend their time in nature or at important historic sites.

Structured Travel: They prefer to travel on their own schedule and choose their own experiences. They will avoid crowded, uncomfortable experiences, like a packed bus.

Experience Appeal and Travel Behaviours

10 Most Appealing Activities (in descending order)

1. Marine life viewing (whale watching, other marine life)
2. Shopping – gourmet foods in retail stores
3. Sunbathing
4. Wildlife viewing – land-based animals & bird watching
5. Visiting amusement/theme parks
6. Visiting national, provincial/State park to view wildlife and surrounding nature and/or to participate in adventure experiences
7. Swimming, tubing, water-skiing, etc.
8. Visiting national, provincial/state parks to visit interpretative centres/museums
9. Agri-touring (visiting farms)
10. Attending performing arts – theatre/musical

3 of the Least Appealing Activities

1. Multi-cultural experiences
2. Attending world exhibitions or world fairs
3. Visiting a health or wellness spa (day visit while on a trip)

Last Trip Long Haul

Party composition & size: Mainly travelled in groups of 2 adults (24%) or 3+ adults with children (13%)

Duration: Half took trips of 4-7 nights (similar to Chinese average). More likely than average to have taken trip of 15-21 nights. Average duration 8.9 nights (vs. 8.5 Chinese average).

Spend: They spent an average amount (\$5,219) or \$103/night per person.

Top 3 Sources for Trip Planning

1. Websites of online retailers, travel agencies or tour operators
2. Discussion with friends, family, business colleagues
3. Travel guides and books

Product:

- Give them opportunities to show off and engage in energetic and exhilarating activities unique to Canada (like outdoor/nature and water-based activities), making sure they can take home these experiences to share.
- Offer all-inclusive opportunities for a getaway– promise comfort, luxury and security.
- Tie in to opportunities for shopping, be they local arts and crafts gifts, brand name items, or gourmet foods.

Price:

- Offer a range of prices. They will want to spend on quality over quantity, but they are conscious of their spending and will not splurge as readily as the Free Spirits.
- Price services and products averagely.

Chinese Aspiring Escapists

Promotion:

- Ensure that websites are up-to-date, presenting the most current and hassle-free experiences.
- Make use of email promotions and other traditional travel advertising sources.
- Leverage opportunities for earned media in Chinese news channels.
- Maintain a positive and active social media and Internet presence.

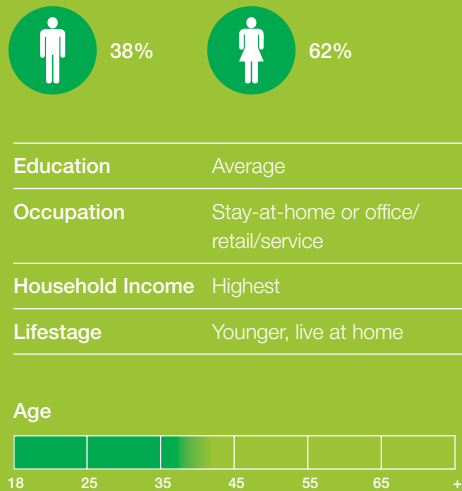
Close the Sale!

- Make it easy for them to book by linking to travel agencies / tour operators.
- Ensure your experience is well promoted by local tour operators and through websites and traditional travel advertising.

**compared to the Global Average while taking into consideration the Market Average*

Japan

Free Spirits 12%



Travel Values

- Travel when they feel the need for a break from the real world and to get away from it all.
- Want to indulge and pamper themselves in a way they can't at home.
- Like to talk about their travel day with others who have shared similar experiences.
- Live for travel and are always on the lookout for information and ideas on where to travel next.
- Like to impress friends and family with the famous places and landmarks they have seen. Also, like to visit places that are frequented by celebrities.
- Have no problem trying the local cuisine, even if it's a far stretch from what they are used to at home.
- Enjoy spending money to travel, and don't like to just leave the organizing up to their spouses.

Social Values

- Optimistic Individuals**
Confident about getting ahead in life, and feel in control of their financial future.
- Untraditional Views**
Believe women are the superior gender in society, also believe in the idea of *Flexible Gender Identity*.
- Open to Diverse Cultures**
Like to experience the customs and cultures of other people.
- Enjoy Shopping, Advertising**
High *Joy of Consumption* and *Ostentatious Consumption* make them label-conscious shoppers.

Travel Behaviours

Vacations

Travel regularly; most likely to prefer travelling someplace new.

Group travel

Most likely to travel as part of an independent group tour.

Accommodations

Most likely to stay in resorts.

Canada

Among those most likely to consider visiting Canada in the future.

Most interested in

Local flavours, rivers/waterfalls, beautiful landscapes, parks/heritage sites, historical/cultural attractions, luxury resorts, entertainment experiences, attractions/landmarks, cities close to nature, shopping, winter activities/scenery.

Less interested in

Golf, local lifestyles, hands-on learning, Canadian hospitality and culture, learning/exploring.

Product Development Tips

- Audit your product offering. Are its strong points a match to the interests of Japanese Free Spirits? This type is often younger and seeks to escape through travel. In addition to Canada's beautiful landscapes, they enjoy luxury holidays, first-class resorts, and shopping. Visiting famous places is a status symbol, so seeing major Canadian attractions and landmarks is a key motivator for visiting. In their quest for fun and adventure, they will enjoy winter activities and scenery, likely as part of a ski resort stay.
- Japanese Free Spirits are drawn to Canada's winter sports. If your offering is in or near a ski resort, create appealing packages that combine luxury accommodations, great cuisine, lift tickets, and other activities that highlight Canada's winter experience.
- Japanese Free Spirits are social and keen on experiencing a little bit of everything. If you have a touring product, feature guided tours of the local tourist hot spots or unique shopping areas in your city.
- Combine forces with a complementary tourism operation to put together special group packages for major sporting, entertainment, or other special events, and featuring first-class meals, accommodation, and transportation.
- Adapt your service offer to increase value perceptions, particularly relating to culture and lifestyle. Train your staff to promote Canada's pristine nature along with some of the cultural and historical experiences. Prepare your team to direct Japanese Free Spirits to the best of cosmopolitan cities, attractions, landmarks, restaurants, and nightlife.

Marketing Tips

- As with many from Japan, this type uses the internet as a tool of choice for travel research. Your website is the gateway to your business, so make sure that its content stresses your Free Spirit product strengths—and that it is written with simple language and keywords (e.g. luxury, activity, beautiful scenery, lifestyle, culture, etc.) that are friendly to search engines. Many Japanese people access the internet via mobile phones, so check to be sure your website is compatible.
- Help them visualize themselves in the experience. Use inspiring imagery that brings together the beautiful backdrops of nature with people enjoying activities, local landmarks, shopping, or vibrant city scenes. Your imagery should bring the experience to life in a convincing way.
- Use messaging that addresses their values. For example, as label-conscious shoppers they are interested in brand names. Or, talk-up the customs in your region and how you apply them.
- Travel consultants and tour operators are popular for both researching travel and booking. Be prepared to work with the travel trade; ensure your product is accessible and easy to book, and that your commission structure and payment policy are competitive.

Japan

Personal History Explorers 14%



59%



41%

Education	Average
Occupation	Retired, some professionals
Household Income	Average
Lifestage	Empty nesters

Age



Travel Values

- More interested in understanding how their ancestors lived than in experiencing the culture as it exists now.
- High security concerns, so they feel more comfortable travelling with other people or a guide.
- Want to experience what it's like to live as the locals do; also like to carefully research the history of their chosen destination beforehand.
- Always on the lookout for information and ideas on where to go on their next adventure.
- Do not travel to get away from it all or to not have to deal with worries and obligations back home.
- Do not have a desire to be pampered or have everything taken care of for them.
- Comfortable adjusting to the unfamiliar, so they don't need the comforts of home, also don't want or expect the very best there is to offer.

Social Values

Pessimistic Individuals

Low *Financial Security* and little desire to advance socially.

Competitive

High *Social Individuality* means these travellers like competition and believe it brings out the best in people.

Traditional Views

High *Religiosity* and highly ethical; don't believe that women are the superior gender in society.

Enjoy Multiculturalism

Open to different cultures and believe they have a great deal to teach.

Travel Behaviours

Destinations

Travel to a wide variety of destinations.

Group travel

Most likely to travel in groups of six or more; more likely to travel in an organized group.

Accommodations

Least likely to stay in resorts or with friends.

Canada

Among those most likely to have visited before; positive about intention to visit in the future.

Most interested in

Historical/cultural attractions, beautiful landscapes, parks and heritage sites, local flavours, guided group tours, hiking/trekking, Canadian festivals/culture, cities close to nature, attractions/landmarks.

Less interested in

Luxury resorts, entertainment experiences, skiing/snowboarding, kayaking/canoeing, fishing/hunting.

Product Development Tips

- Audit your product offering: Are its strong points a match to the interests of Japanese Personal History Explorers? They enjoy a mix of both nature and culture, and will focus on heritage sites and national parks. While Canada's beautiful landscapes are a prime motivator, cultural/historical attractions are also a top priority. They like to travel in groups, and are happy with a comprehensive guided tour schedule; this ensures they will see at least a little bit of everything their destination has to offer. While open to a quick hike at a national park, they typically stay away from strenuous outdoor activities.
- Enhance your emphasis on history or culture. For example, if you run an attraction, consider working with a local genealogy society or museum to add interpretive materials or tours that encourage exploration and discovery around local history. A restaurant could add framed archival photographs to its walls and feature local cuisine on its menu.
- Japanese Personal History Explorers favour seeing Canada via guided group tours. Partner with a complementary supplier if you don't offer your own, and be sure to include not only key heritage and cultural sites but also festivals and events that showcase the local community.
- Adapt your service offer to increase value perceptions, particularly related to Canadian heritage and culture. Orient your staff to local history and culture so that they can give visitors tips on local historical landmarks.

Marketing Tips

- As with many from Japan, this type uses the internet as a tool of choice for travel research. Your website is the gateway to your business, so make sure that its content stresses your Personal History Explorer product strengths—and that it is written with simple language and keywords (e.g. heritage, national parks, learning, culture, lifestyle, etc.) that are friendly to search engines. Many Japanese people access the internet via mobile phones, so make sure your website is compatible.
- Help them visualize themselves in the experience. Use imagery that brings together the beautiful backdrops of nature with people enjoying national parks, the local culture, and heritage sites. Imagery should highlight the natural setting and bring the experience to life in a convincing way.
- Use messaging that addresses their values. For example, their low financial security may mean they need more convincing regarding the value associated with the trip. You can also focus on their openness to learning about different cultures.
- Travel consultants and tour operators are popular for both researching travel and booking. Be prepared to work with the travel trade; ensure your product is accessible and easy to book, and that your commission structure and payment policy are competitive.

Japan

Cultural History Buffs 16%



57%



43%

Education	Highest
Occupation	Professionals
Household Income	Higher
Lifestage	Younger singles

Age



Travel Values

- Prefer to go with the flow and let things unfold spontaneously, instead of following other people's schedules.
- Like to learn the local language, and get off the beaten path. Also, they believe it is enriching to be exposed to others by engaging in their customs, routines, and rituals in their own environment.
- Always make an effort to visit places that are linked to their favourite hobbies or topics.
- Live for travel and tend to start thinking about their next adventure as soon as they get home from their last one.
- Don't want everything organized for them, nor do they feel safer travelling with other people or a guide.
- Comfortable adjusting to the unfamiliar, and do not want the best there is on offer.

Social Values

Live Life the Fullest

Like to appreciate the good things in life.

Untraditional Views

Strive for *Gender Parity* in the workplace, and believe in the ideas of *Flexible Families* and *Flexible Gender Identity*.

Accepting of Diverse Cultures

See the benefits a mix of different cultures has on the community, and believe we can learn a lot from these cultures.

Dislike Shopping

Low *Joy of Consumption*, while not consciously seeking out brand name products.

Travel Behaviours

Vacations

Travel as much as possible, and for the longest periods (two or more weeks at a time).

Group travel

Least likely to travel as part of an all-inclusive package.

Destinations

Travel to the widest range of destinations, especially North America and Western Europe.

Canada

Among those most likely to consider visiting in the future.

Most interested in

Self-touring, local flavours and lifestyles, Canadian hospitality, Aboriginal culture, historical/cultural attractions, parks and heritage sites, beautiful landscapes, cities close to nature, hands-on learning.

Less interested in

Guided group tours, golf, entertainment, shopping, luxury resorts, spas.

Product Development Tips

- Audit your product offering: Are its strong points a match to the interests of Japanese Cultural History Explorers? In addition to Canada's pristine natural beauty, this group seeks out destinations of historical and cultural significance. They prefer opportunities to experience the local culture hands-on in an effort to learn and grow. They love to absorb the true lifestyle of their destinations, and are keen on discovering Aboriginal culture. These travellers are more likely to opt for independent touring so that they have the freedom to observe and absorb at their own pace. They tend to focus on simple accommodation that provides the chance to be closer to the locals and to experience Canadian hospitality first-hand.
- Enhance your emphasis on learning about culture or history. Ensure your product offering includes learning-based tours, or collaborate with a complementary operator that focuses on exploration of the local history and culture.
- If you have food service in your product mix, consider partnering with a local supplier to offer cooking classes with historical or cultural significance (e.g. a full-course French-Canadian meal or traditional Aboriginal food).
- Japanese Cultural History Explorers enjoy nature and the outdoors to some extent, so if your product allows, or if you can partner with a complementary provider, offer experiential hands-on opportunities to take-in the natural surroundings.
- Review your service offer to ensure it emphasizes value perceptions that are key to the Cultural History Explorers. Orient your staff toward hands-on opportunities to experience Canadian culture, and towards venues and vehicles for learning about the history.

Marketing Tips

- Your website is the gateway to your business; make sure its content stresses your product strengths for this type. Use simple language and keywords (learning, Canadian culture, Canadian hospitality, Aboriginal culture, outdoor adventure, etc.) that are friendly to search engines. Many Japanese people access the internet via mobile phones, so check to be sure your website is compatible.
- Help them visualize themselves in the experience. Use inspiring imagery that brings together the beautiful backdrops of nature with people experiencing the local culture hands-on. Your imagery should highlight the natural setting and bring the experience to life in a convincing way.
- Use messaging that addresses their values. For example this type is open to diversity and appreciates the good things in life.
- Travel consultants and tour operators are popular for both researching travel and booking. Be prepared to work with the travel trade; ensure your product is accessible and easy to book, and that your commission structure and payment policy are competitive.

South Korea

Free Spirits 11%



Travel Values

- Constant travellers who travel mainly to get away from their real lives, and pamper themselves the way they can't at home.
- Like to be free and spontaneous and do things that other travellers would not do.
- Have fun by engaging in excessive behaviour.
- Want to be the centre of attention.
- Don't want to wait at home. They have a constant need to travel and the internet is no substitute.
- Want to live as authentically as the locals do.

Social Values

Personal Challenge

High *Personal Challenge* and *Risk-taking*, with an *Adaptive Navigation*, these travellers easily figure how to make the most of a situation.

Upward Striving

High *Social Mobility* and *Entrepreneurialism*.

Social Connection

Craves *Social Intimacy*, *Celebrating Passages* and *Attraction to Crowds*.

Discerning, Flashy Consumers

Discerning Consumers, but *Need for Status Recognition* drives *Ostentatious Consumption* and *Upscale Consumerism*.

Travel Behaviours

Vacations

Least likely to return to past destinations.

Adventure/fun travel

More likely to want to learn, explore something new, and engage in the local culture. Also travel to shop and for outdoor activities.

Accommodations

A variety, from the luxurious to the more modest and locally relevant.

Most interested in

Beautiful landscapes, rivers/waterfalls, cities close to nature, local flavours, luxury resorts and being pampered, entertainment experiences, shopping, attractions and landmarks, outdoor adventures.

Less Interested in

Guided group tours.

Product Development Tips

- Audit your product offering. Are its strong points a match to the interests of South Korean Free Spirits? In addition to being attracted to Canada's beautiful landscapes, they want to be pampered, stay in luxury, first-class resorts, and indulge in entertainment experiences. Cities close to nature are a top preference, allowing them to enjoy unique Canadian shopping experiences. True to the Free Spirit pursuit of fun and excitement, select outdoor activities such as skiing and kayaking/canoeing will make the list of things to do, likely as part of a resort stay.
- South Korean Free Spirits are drawn to spa and wellness in their quest to be pampered. If your product offers this, create appealing packages that combine luxury accommodations, great cuisine, and spa services.
- This type is social and seeks fun and adventure. If your product is in or near to a ski resort, assemble packages that include lift tickets, spa services, luxury accommodations, and great meals.
- Combine forces with a complementary tourism operation to put together special group packages for major entertainment events or other special events, and featuring first-class meals, accommodations, and transportation.
- Adapt your service offer to increase value perceptions, particularly related to luxury and adventure. Train your staff to promote Canada's pristine nature along with the some of the options for adventure and pampering. Have your team ready to direct South Korean Free Spirits to the best of cosmopolitan cities, spas, shopping, restaurants, and nightlife.

Marketing Tips

- As with many from Korea, the internet is a tool of choice for travel research. Your website is the gateway to your business, so make sure that its content stresses your Free Spirit product strengths—and that it is written with simple language and keywords (e.g. luxury, activity, beautiful scenery, shopping, entertainment, culture, etc.) that are friendly to search engines.
- Help them visualize themselves in the experience. Use inspiring imagery that brings together the beautiful backdrops of nature and vibrant city scenes with people having fun, being pampered, and taking in adventures. Your imagery should bring the experience to life in a convincing way.
- Use messaging that addresses their values. For example, talk to how your offer is perfect for a celebration, or use testimonials (if possible) to provide status through association.
- While South Koreans are highly advanced in terms of internet usage, many prefer to work with travel consultants or package providers when booking travel in order to have direct contact. Be prepared to work with the travel trade; ensure your product is accessible and easy to book, and that your commission structure and payment policy are competitive.

South Korea

Personal History Explorers 10%



57%



43%

Education High

Occupation Professionals or retired

Household Income High

Lifestage Empty nesters

Age



Travel Values

- Fascinated by the ancient history as well as the modern cultures of the places they visit.
- Deep interest in understanding their ancestry and heritage.
- Like organized/guided tours that leave the decision-making to others, and where they can have a chance to talk to others about their experiences.
- Luxury and comfort detracts from the authentic experiences these travellers are looking for.
- Travel is not about escape, but rather learning about historical and modern culture and about their own roots.

Social Values

Personal Challenge

Risk-taking, with an *Adaptive Navigation*, these travellers easily figure out how to make the most of a situation.

Traditionally Minded

Generally reject liberal definitions of gender roles, family composition, and hold conventional ideals such as *Duty, Work Ethic, Conformity to Norms*.

Roots

Resisting *Cultural Assimilation* they Search for *Roots*. Important are *Celebrating Passages* and *Meaningful Moments*.

Careful Shoppers

High *Discriminating Consumerism* and low *Confidence in Advertising* leads them away from impulsive purchases.

Travel Behaviours

Vacations

Most likely to own a passport.

Adventure travel

More likely to want to learn, explore something new, and engage in the local culture.

Destinations

Among the least inclined to travel within their own borders. Most likely to travel as part of an all-inclusive package.

Most interested in

Local flavours, rivers/waterfalls, parks/heritage sites, historical/cultural attractions, cities close to nature, Aboriginal culture/attractions, beautiful landscapes, guided group tours.

Less interested in

Entertainment, sports events, skiing/snowboarding, fishing/hunting, shopping, outdoors adventure, small towns, combining business with pleasure.

Product Development Tips

- Audit your product offering. Are its strong points a match to the interests of South Korean Personal History Explorers? Primarily attracted to Canada's spectacular natural setting, they are driven by a keen interest in visiting cultural and historical sites and attractions. Their approach is generally passive so guided group tours are popular and allow the opportunity to take in the scenery and culture without being too active or roughing it. This group is more interested in Aboriginal culture than others from South Korea.
- Enhance your emphasis on history or culture. For example, if you run an attraction, consider working with a local genealogy society or museum to add interpretive materials or tours that encourage exploration and discovery around local history. A restaurant could add framed archival photographs to its walls and feature local cuisine on its menu.
- South Korean Personal History Explorers favour seeing Canada via guided group tours. Partner with a complementary supplier if you don't offer your own, and be sure to include not only key scenic and heritage sites but also festivals and events that showcase the local community.
- Adapt your service offer to increase value perceptions, particularly related to Canadian heritage and culture. Orient your staff to local history and culture so that they can give visitors tips on historical landmarks or out-of-the-way places that only the locals know.

Marketing Tips

- As with many from Korea, this type uses the internet as a tool of choice for travel research. Your website is the gateway to your business, so make sure that its content stresses your Personal History Explorer product strengths—and that it is written with simple language and keywords (e.g. heritage, national parks, Aboriginal culture, Canadian culture, nature, etc.) that are friendly to search engines.
- Help them visualize themselves in the experience. Use inspiring imagery that brings together the beautiful backdrops of nature with people enjoying national parks, the local culture, and heritage sites. Your imagery should highlight the natural setting and bring the experience to life in a convincing way.
- Use messaging that addresses their values. For example, Personal History Explorers may feel more comfortable if your communications are more formal (i.e. they conform to norms).
- While South Koreans are highly advanced in terms of internet usage, many prefer to work with travel consultants or package providers when booking travel in order to have direct contact. Be prepared to work with the travel trade; ensure your product is accessible and easy to book, and that your commission structure and payment policy are competitive.

South Korea

Cultural History Buffs 16%



55%



45%

Education	Highest
Occupation	Office/retail/service, some students
Household Income	High
Lifestage	Younger singles

Age



Travel Values

- Plan at least one trip a year.
- Deep desire to engage with the locals and learn their customs and languages.
- Desire freedom and spontaneity, so they avoid travelling in groups.
- Seek an authentic experience and are willing to experience uncomfortable amenities and modes of travel.
- While cautious, these travellers are not afraid to venture into the unknown in pursuit of discovery. They will not be constrained to “tourist” schedules or destinations, but will chart their own courses.

Social Values

Upward Striving

High *Social Mobility* and *Entrepreneurialism* inspire a strong sense of *Personal Challenge*.

Cultural Learning

Deep interest in learning about other cultures through *Cultural Sampling* and *Multiculturalism*, but not open to *Racial Fusion*.

Authentic Connections

High *Social Intimacy* and *Networking*, but also high *Consistent Self*.

Anti-Business

Low *Confidence in Small/Big Business* and *Advertising*, driving them away from *Buying on Impulse* and *Ostentatious Consumption*.

Travel Behaviours

Vacations

Short; often choose weekend getaways.

Adventure/escape travel

More likely to want to learn, explore something new, and engage in the local culture. Also, travel to escape and relax.

Accommodations

Open to B&Bs, family inns, camping.

Most interested in

Local flavours, self-touring, beautiful landscapes, winter scenes, cities close to nature, attractions/landmarks, parks/heritage sites, wildlife, outdoors adventure, hands-on learning, exploring, hiking/trekking, relaxing/rejuvenating.

Less interested in

Guided group tours, playing golf, luxury resorts/pampering/spas, entertainment.

Product Development Tips

- Audit your product offering: are its strong points a match to the interests of South Korean Cultural History Buffs? In addition to Canada's pristine natural beauty, this group is interested in an active approach to experiencing both nature and culture. They prefer opportunities to interact with the local culture hands-on in an effort to learn and grow. They enjoy taking in nature by hiking/trekking, as well as sampling local flavours through interaction that reveals the true lifestyle of their destinations. These travellers are more likely to opt for independent touring so they have the freedom to observe and absorb at their own pace. They tend to shun luxury experiences and focus on simple accommodation that provides the chance to be closer to the locals and experience Canadian hospitality first-hand.
- Enhance your emphasis on learning about culture or history. Ensure your product offering includes learning-based tours, or collaborate with a complementary operator that focuses on exploration of the local history and culture.
- If your product is near a natural hot spring, focus on the rejuvenation and invigoration aspect of your destination by combining a visit with nature walks. This group of South Koreans prioritizes well being, and relevant programs will peak their interest.
- South Korean Cultural History Buffs enjoy nature and the outdoors, so if your product allows, or if you can partner with a complementary provider, offer experiential hands-on opportunities to take in the local culture.

- Review your service offer to ensure it emphasizes value perceptions that are key to the Cultural History Buffs. Orient your staff toward hands-on opportunities to experience Canadian culture, and toward venues and vehicles for learning about the nature and culture of your destination.

Marketing Tips

- As with many South Koreans, this types uses the internet as a primary tool for travel research. Your website is the gateway to your business, so make sure that its content stresses your Cultural History Buff product strengths—and that it is written with simple language and keywords (e.g. learning, Canadian culture, Canadian hospitality, Aboriginal culture, outdoor adventure, etc.) that are friendly to search engines.
- Help them visualize themselves in the experience. Use inspiring imagery that brings together the beautiful backdrops of nature with people experiencing the local culture hands-on. Your imagery should highlight the natural setting and bring the experience to life in a convincing way.
- Use messaging that addresses their values. For example, they do not buy on impulse—they will want to research everything, so give them time and information to do so.
- While South Koreans are highly advanced in terms of internet usage, many prefer to work with travel consultants or package providers when booking travel in order to have direct contact. Be prepared to work with the travel trade; ensure your product is accessible and easy to book, and that your commission structure and payment policy are competitive.

Social Values Glossary

TREND	DEFINITION
Adaptability to Complexity	Tendency to adapt easily to the uncertainties of modern life, and not to feel threatened by the changes and complexities of society today. A desire to explore this complexity as a learning experience and a source of opportunity. (R of Aversion to Complexity)
Adaptive Navigation	Having the flexibility to adapt to unforeseen events that interfere with the realization of one's goals. Being flexible in defining one's expectations and ways of meeting one's objectives.
Advertising as Stimulus	Tendency to enjoy viewing advertising for its aesthetic properties; to enjoy advertising in a wide range of venues, from magazines to television to outdoor signs and billboards.
Anomie & Aimlessness	The feeling of having no goals in life. Experiencing a void of meaning with respect to life in general. A feeling of alienation from society, having the impression of being cut off from what's happening.
Attraction to Crowds	Enjoyment of being in large crowds as a means of deindividuation and connection-seeking
Aversion to Complexity	A desire to keep one's life simple and predictable. People strong on this trend are intimidated and threatened by the changes in society and the complexities of modern life. They seek stability and simplicity. (R of Adaptability to Complexity)
Brand Apathy	Placing little importance on the brand name of a product. (R of Importance of Brand)
Buying on Impulse	Tendency to purchase products on impulse, enticed by exciting advertising or packaging. Rarely seeking out information on products before buying. (R of Discriminating Consumerism)
Celebrating Passages	A need to perform certain rituals or small acts to demarcate the passing of various phases of one's life. A desire to celebrate traditional passages (e.g. birth, marriage, death), or invent new ones.
Concern for Appearance	Placing a great deal of importance on appearing "attractive", and concerned about the image projected by one's appearance. People who are strong on this trend are image-driven.
Confidence in Advertising	Tendency to trust and use advertising as a source of reliable information. Also, a tendency to identify with the fashions and the role models promoted by advertising and the consumer society. (R of Skepticism of Advertising)
Confidence in Big Business	The belief that big businesses strive to strike a fair balance between making profit and working in the public's interest. Expressing a certain level of faith that what serves the interest of big business also serves the interest of society, and vice-versa. Associating good quality and service with big companies and well-known products.
Confidence in Small Business	Confidence in the commitment of small business-owners to the provision of quality goods and services. Belief that small business owners are not just profit-driven.
Conformity to Norms	A desire to conform to existing social norms. People strongest on this trend express concern about what others might think of them and make efforts to avoid standing out from others.

Consistent Self	Remaining true to one's own ideals and convictions, even in the face of social pressure. People who are strongest on this trend do not feel compelled to modify their beliefs, attitudes, or behavior to conform to different social situations. (R of Malleable Self)
Cultural Assimilation	Belief that people should adopt a culture of one's country of residence first and foremost. Believing that, immigrants should let go of their languages and customs and embrace the way of life of the country in which they now live. (R of Multiculturalism)
Culture Sampling	This trend identifies the view that other cultures have a great deal to teach us, and measures people's inclination to incorporate some of these cultural influences into their own lives.
Discerning Hedonism	The capacity to savor pleasures; the appreciation of complex emotions and the ability to link enjoyment to other realms of experience in everyday life.
Discount Consumerism	Preferring to buy discount or private label brands, often from wholesalers, discount outlet stores or the sale displays at national retailers (R. of Upscale Consumerism)
Discriminating Consumerism	Seeking objective, comparative product information and carefully evaluating one's needs before making purchases. Preference for practical and functional products, satisfying real needs. (R of Buying on Impulse)
Duty	Belief that duties and obligations to others should be fulfilled before turning to one's personal pleasures and interests.
Ecological Concern	A tendency to believe that today's environmental problems are a result of industrial and personal disregard for the environment. These people feel that the trend towards environmental destruction is unacceptable and reject the notion that job protection or economic advancement should be allowed at the expense of environmental protection.
Enthusiasm for New Technology	Fascination with the possibilities offered by modern technology. Seeks information about the latest products and innovations. Excitement about the ways technology can better their lives.
Entrepreneurialism	Taking steps to fulfill the dream of becoming self-employed, rather than a 9 to 5 employee. Feeling that the freedom and opportunity that comes with owning one's own business is more rewarding than working for someone else.
Ethical Consumerism	A focus on the perceived ethical and social responsibility policies and practices of the companies from which they buy. Consideration of labor policies, mistreatment of animals, etc. Desire to see companies be good corporate citizens in terms of these social concerns.
Everyday Ethics	A measure of how individuals respond in situations that put their ethical beliefs to the test. When a person sees a way of turning a situation to his advantage at the expense of another person, institution or company, how does he respond? Will he report mistakes made in his favor by a waiter, a bank or the government?
Financial Security	A feeling of security and optimism about one's financial future. A sense of being personally responsible for and in control of one's financial situation.
Global Consciousness	Considering oneself a "citizen of the world" first and foremost, over a "citizen of one's community and country". Non-ethnocentricity, feeling affinity to peoples in all countries. (R of Parochialism)
Happiness	A belief that the primary goal of life is to gain happiness through excitement and appreciation of the good things in life.
Importance of Aesthetics	Tendency to base purchase decisions on aesthetic rather than utilitarian considerations. Measures the attention given to the beauty of objects and products purchased. People strong on this trend often buy products purely for their appearance.

Importance of Brand	Giving great weight to the brand name of a product or service, a tendency to have favorite brands. (R of Rejection of Brands)
Importance of Spontaneity	Tendencies to enthusiastically embrace the unexpected and spontaneous events that temporarily interrupt daily routines.
Intuition & Impulse	A way of understanding and transacting with the world that largely leaves aside controlled and critical rational thought. A tendency to be guided less by reason and ideology than by one's own emotions and feelings. Impulsive and spontaneous, able to change one's opinions easily.
Joy of Consumption	Intense gratification through the purchase of consumer goods (rather than basic necessities). Enjoying consumption for the pleasure of consumption. People who are strong on this trend are often more excited by the act of buying than by the use of the products they buy.
Living Virtually	People strong on this trend are spending an increasing amount of time watching TV, using computers, or at the movies. Reflects a more virtual than real connection to the world.
Meaningful Moments	Cherishing the ordinary moments in everyday life over once-in-a-lifetime, grand-scale events. Taking time to indulge in individual pleasures. The sense of impermanence that accompanies momentary connections with others does not diminish the value of the moment.
Multiculturalism	Openness toward the diverse cultures, ethnic communities and immigrants that make up a country's population. A belief that ethnic groups should be encouraged to preserve their cultural identities, and that others should seek to learn about them (R of Cultural Assimilation).
Need for Status Recognition	Desire to be held in esteem and respect by others, and to express one's social standing or aspired status, through a display of fine manners, good taste, style or "chic".
Need for Uniqueness	A desire to be individualistic and stand out in the crowd. People strongest on this trend do not worry about what others might think about them but tailor their appearance, behavior and activities to be different.
Obedience to Authority	A belief in playing by the rules. The belief that persons or organizations in positions of authority should be deferred to at all times. There are rules in society and everyone should follow them. Feeling that young people in particular should be taught to obey authority rather than question it. (R of Rejection of Authority)
Ostentatious Consumption	Desire to impress others and express one's social standing through the display of objects that symbolize affluence.
Penchant for Risk	Desire to take risks in order to get what one wants out of life. Also, indulging in dangerous and forbidden activities for their associated emotional high.
Personal Challenge	Setting difficult goals, even if just to prove to themselves that they can do it. People strong on this trend finish what they start, persevering until their self-assigned task is completed to their satisfaction. Rejecting personal failure.
Personal Control	Striving to organize and control the direction of one's future, even when it feels that there are forces beyond one's immediate control. (R of Fatalism)
Personal Creativity	Desire to use one's imagination and creative talents in daily life, both at work and at play.
Personal Escape	Interest in mystery, romanticism and adventure, as a means of distracting one's self from everyday challenges and burdens. People strongest on this trend feel that their dreams and imagination are important driving forces in their daily lives and long for that which is beyond the practical, and desire to experience beauty and pleasure in surprise and astonishment.

Primacy of the Family	Centrality of family; making personal sacrifices and providing for one's children over all else.
Propriety	The importance of dressing so as not to give offence, but rather to elicit and communicate respect in more formal relationships, in public, and at work. Behaving in a way that respects oneself and others. A preference for the formal over the casual.
Rejection of Authority	Desire to transcend the rigid framework of traditional authority. Possessing a questioning orientation, critical of and willing to look beyond the status quo. (R of Obedience to Authority)
Rejection of Order	Living with a certain amount of disorder as an expression of oneself. Also, a desire to distance oneself from society's traditional moral code governing good manners and the golden rule in favor of a more informal and relaxed approach to life.
Religiosity	Placing great importance on religion as a construct which guides one's life. Also, placing great significance on having an affiliation with an organized religious faith. Tendency to consider that religion represents the essential values and education that should be transmitted to the next generation.
Saving on Principle	The tendency to save and accumulate money, motivated by a moral impulse for future security. A preference for frugality and denial to self of "luxuries". Displaying tendencies towards inhibition.
Search for Roots	Desire to preserve and maintain one's cultural and ethnic roots and to live in accordance with one's own traditions and customs. Also, a yearning to return to one's cultural roots in order to rediscover, and participate in, the fundamental values that give meaning to one's life.
Selective use of Professional Services	Deferring to experts for advice when needed, but maintaining contact with them. Those highest on this trend seek opportunities to learn from them or even play an active role in the decision making process.
Sexism	Belief that "the father of the family must be the master in his own home." Believing in traditional, male-dominated views on the division of gender roles - that men are naturally superior to women. These views carry into economic issues such as the belief that, when both partners are working, the husband should be the main bread-winner.
Skepticism of Advertising	Distrust that advertising messages are truthful or even helpful for making purchasing decisions. (R of Confidence in Advertising)
Social Intimacy	A desire to be around and connect with smaller, closely knit groups of people. Feeling that smaller organizations are better than larger ones.
Social Mobility	Feeling that social advancement is both desirable and available to those with the skills and/ or connections to make it happen. Reliance on 'hard skills' like education and training, as well as 'soft skills' like personal relations to advance.
Social Responsibility	A belief that society, and the individual, has a responsibility to help those less fortunate. Tendency to believe that quality of life can improve when people work together.
Time Stress	Feeling overwhelmed by the demands on one's time. A desire to obtain better control of one's life stress, particularly as it applies to better time management.
Vitality	The sense that one has a great deal of energy and is in contact with this energy. Measures an energetic, lively approach to life, a feeling that one has more vigor and initiative than most other people.
Work Ethic	Following the "golden rule" and guiding one's life according to the principles of deferring pleasure in order to realized greater gains in the future. Individuals who score high on this trend believe that children should be taught to work hard in order to get ahead.

Travel Values Glossary

TREND	DEFINITION	ITEMS
Check-list	Feeling a strong need to ensure that they see all of the well-known sites in their destination, following detailed itineraries. Believing that they are missing something important if their plans are changed unexpectedly.	If I miss something or don't get to see all of the things on my list I don't feel that the trip is successful. I always feel like I've missed something when plans get changed unexpectedly. Lists help to keep things orderly, so I can get everything done that I plan to do.
Comfort Seekers	Avoid travel experiences that require them to step out of their comfort zones and that don't provide the conveniences and comfort they are accustomed to. A preference for travel experiences to be as relaxing as possible. Not wanting to have to adapt to unfamiliar foods, customs, and languages, but seeking out the familiar instead.	I avoid taking uncomfortable rides such as packed local buses. If it means missing something we wanted to visit, so be it. The part that makes me most uncomfortable about travelling is having to adjust to unfamiliar locations, foods, people, languages and a different way of doing things. I don't want to eat food that isn't like the food I eat at home. I am really not comfortable using bathrooms outside my home or sleeping in a bed that is not mine.
Comparison Travel	Constantly comparing the positive and negative aspects of a destination to what is known at home. Many like to brag about the superiority of the places they have visited, while others will complain that the places they are visiting lack the amenities they are accustomed to at home.	You can't find real culture here at home; you have to travel abroad to find it. I like to be able to impress my friends with all of the 5 star hotels and resorts I have been to. Which of the following best matches your personal opinion:
Constant Travel	Always looking forward to planning and taking the next trip. People strongest on this trend feel they 'live for travel', and that travel is the best way to experience life and learn about different places and cultures. Even between trips they will avidly read travel articles to inspire their future plans to visit new places.	As soon as I finish one vacation trip I am already thinking about the next. I'm always on the lookout for information about where to travel next – I ask friends, I read the travel section of the newspapers, I go on the internet and read books and magazines. I live for travel. The best way to 'truly' experience life is to travel often. I love to read books and watch shows that inspire me for my next vacation or place to visit. Every year I plan at least one trip that lets me unwind, relax and recharge for the next phase of the year.
Cultural Immersion	A belief that the best way to experience a culture is to interact with it as deeply as possible. People strongest on this trend make an effort to learn and practice conversing with locals in their own languages. They seek to adapt to the local culture, exploring and spending time in local areas most tourists don't visit, so they can experience how locals live as authentically as possible.	I try to learn and use some of language spoken by the people so I can interact with locals in a more authentic way. I like to experience local foods, local locations, to see local architecture. I like to put myself in the shoes of locals and experience what it is like to live as they do as closely as possible. I like to leave the beaten path and explore places most tourists won't go to.

Escape	A desire to separate themselves from their everyday responsibilities and concerns when travelling. Those strongest on this trend seek to completely disconnect themselves from their home, office or other commitments so they can feel completely relaxed.	I need a real break from the real world. I want to get away from it all. I just want to relax and not have to deal with any worries or obligations. I want to forget about my responsibilities at home for awhile. I completely disconnect: I don't want to hear a cell phone or a fax machine; I want to forget about work. I want a break from my ordinary life.
Exhibitionism	Seeking fun experiences that allow them to act in an extroverted fashion, expressing themselves vibrantly. Many are attracted to clubs and nightlife venues in the destinations they visit.	I like to express myself physically – I will dance my head off if that is what is happening. I like to go out to clubs and dance all night. Wherever I go, I enjoy being the centre of attention.
Group Travel	Preferring the structure and predictability that comes from traveling with groups of like-minded tourists. Taking comfort in knowing that the tour operator has taken care of all of the details (hotels, restaurants, sites to visit). Enjoying meeting and sharing stories with other tourists similar to oneself.	I like group tours because there is always someone that you can talk to about your day. I feel more comfortable travelling with other people or a guide. I feel safer if a tour operator has organized the hotel, the restaurants to eat at and the sites to visit. I like to travel in ways that allow me to talk to other travellers about what they are seeing and doing.
Hobbies	Enjoying travel to destinations and sites related to one's favourite hobbies and interests, often researching in advance the availability of these activities in new destinations.	If there are places linked to my favourite hobbies or topics available, I always make an effort to go and see these places. For my favourite topics or interests, I like to research them, and then visit the places where I can learn more about them. I have a hobby or interest that is very important to me, and when I travel, it's almost always connected to that subject.
Hedonistic Rejuvenation	Adopting a care-free and indulgent manner while travelling, behaving in a far less reserved fashion than they normally do at home. Many seek to be pampered or to indulge in food, drink, massage, or other sensory/hedonistic activities that create a more relaxing experience for them.	I am much more indulgent and carefree while on vacation than I am at home. I want to come back from vacation feeling relaxed and refreshed. I want everything to be taken care of for me so I can relax and be free to enjoy myself. I want a vacation where I can have all the food, drink, massage, romance, shopping that I want. I like to indulge and pamper myself in a way that I can't back home. I need to be pampered on vacation; I want someone to clean up the room, bring me my meals, have the wine ready, give me a massage.
Historical Travel	Seeking to visit the sites where important historical events took place (e.g. cultural, arts, philosophy, religion, battles, political, etc.). They want to see the surroundings and imagine what it would have been like if they could go back in time, and to understand what has changed since then. People strongest on this trend tend to arrive at key sites having researched the history extensively and knowing as much or more than the guides do.	I like to be able to take my time at a historic site or in a museum and not feel rushed. I want to be able to stand in the place where history happened – to touch the relics of that time. Certain places and times in history fascinate me, and I want to know everything about them. I find it enriching to be exposed to others engaging in their customs, routines and rituals in their own environment – to me, that is the authentic travel experience. I am not satisfied with just observing: It is more important to me to experience all the things a place or culture has to offer as a local would, and not just be a 'tourist'. Visiting the sites of historical significance are more interesting to me than any of the other tourist attractions. I always carefully research the history of the places I visit before I travel there.

Luxury Travel	A desire to have and experience the finest food, accommodations, and amenities available. Those strongest on this trend are not necessarily wealthy, but share a desire to treat themselves to luxuries while on vacation. Many are oriented to resorts where local entertainment, gift shops and other attractions are available only to themselves and other guests, rather than the culture at large.	Wherever I go, I have to have the very best there is to offer: the best hotels, the best restaurants, the best shopping and the best service. I don't understand people who prefer to stay at hostels or low budget accommodations when they are travelling. I like to be in a 'gated resort' where only the people who are there are guests who may come and go. I want experiences and amenities that most others would consider to be 'luxuries.' I feel safer if the hotel where we stay is a brand name that is known world wide. I like staying at hotels and resorts that have local entertainment and good gift shops with local crafts.
Nature Travel	Appreciating the beauty of nature, whether vast mountain ranges, tropical rainforests, northern glaciers, or barren deserts, or more localized parks. Wanting to see natural settings before they are damaged by development or encroachment.	I enjoy being surrounded by the open spaces and wilderness of the outdoors. I prefer to visit places where I will be awe-struck by the sheer beauty of nature, the land, mountains, seas and wildlife. I would like to see such natural wonders as the Alaskan Glaciers, the Great Barrier Reef, the Himalayan mountains, the Amazon Basin rainforests, etc. We like to stroll in the parks of the places we visit. I always like to walk or ride my bike on the local paths. I want to see natural settings before they are ruined.
Roots Travel	Reconnecting with one's cultural heritage by visiting the places one's ancestors lived and imagining what it would have been like to live among them. Wanting their children to visit so they can connect and learn more about their roots and history.	I'm more interested in understanding how my ancestors lived than in experiencing the culture as it exists now. I want to experience what it would have been like to live like my ancestors because it makes me feel more connected to my cultural heritage. I want my children to know about their roots, their real history. I find that I often know the facts about historical sites more than the tour guides do.
Reluctant Travel	Possessing a negative attitude towards travel, often rooted in fears and insecurities about what one will encounter. Viewing travel as unnecessary or unpleasant. Those strongest on this trend are often dragged along by their partners or other family members, but would rather stay at home or in the hotel while others in their party visit the local sites.	I have everything I need at home; there's no reason to spend money to travel. I prefer to relax at home surrounded by my own things rather than to go out and travel. I don't see the point in going on a trip. Everything I need and want is at home. I really don't care to travel. If we have to, I leave it up to my spouse to decide where we go and what we do. With the Internet and television, I don't have to travel to learn about other places. Travelling is really more important to my spouse than to me, so I just go along. I don't need or want to learn anything new by travelling. If we do take a vacation away from home, I prefer to stay in the room and watch TV while the others I am travelling with go off and do their own thing. If I must take a trip, I prefer it to be visiting family or friends.
Samplers	Wanting to visit all of the "must see" sites and attractions while on vacation to truly feel that they have experienced the full flavour of a destination. With a limited amount of time, these travellers prefer to visit a wider array of sites and attractions briefly, than to spend more time visiting just one or two sites in-depth.	I like to see all of the important highlights of a place, but I don't need to go in depth or spend hours on any one thing. I like to visit the "famous" sites rather than just travel around and observe people in their everyday lives. Time is limited; I liked to focus on the 'must-see's, the places that are considered important to make sure I get a taste of everything and get a flavour of the place I am visiting. I like to refer to popular tour guide books to help me plan all of the things I have to see when I visit some place new.

Security Concern	Feeling anxious about travel, often worrying about or imagining the harm that might befall them. Those strongest on this trend will watch their surroundings vigilantly, being fearful of being robbed or taken advantage of.	We have to be very careful when we travel, because you never know what might happen. I worry that we will be robbed or worse when we travel. I try to keep a very low profile when travelling and not stand out. I try to spend as little money as possible, whether I am on a strict budget or not.
Shared Experience	Viewing travel as a social activity and an opportunity to share one's experiences with others. Those strongest on this trend tend to be sentimental, seeking to collect and share memories with others.	I enjoy sharing my travel memories with others because it lets me 're-live' them. I like to share with other people the memories of where I've been and what I've done. I like to take out my photo albums and relive my experiences of the trips I have taken and places I have been. I always keep receipts, ticket stubs, and different souvenirs of the things I did on vacation as mementos of my travel experiences. I like to talk about my travel day with others who have shared similar experiences. Even when I can't travel, I like hearing about different places I could visit someday. I love the "getting ready for the trip" planning just as much as the trip itself. Travelling is so much less enjoyable when you have to do it alone.
Show Off Travel	A desire to visit well-known landmarks and locations showcased in popular culture, or places that are known to be popular with celebrities. Those strongest on this trend are often motivated by a desire to gain social status by being able to brag to their friends and family about all the famous people they have met and places they have been.	I like to be able to impress my friends and family with all of the famous places and landmarks that I have been to I am interested in visiting locations that have been shown in my favourite movies and TV shows I am interested in visiting locations that are frequented by celebrities
Unstructured Travel	A desire for adventure, discovery and exploration that can only be achieved by traveling spontaneously. They do not want to be constrained by pre-determined plans or itineraries, and are not concerned about missing popular tourist destinations. Wanting to be able to discover hidden sites (shops, streets, restaurants, etc.) that only the locals would know about.	I don't need to see all the recommended tourist sites to feel as if I've really visited a place; in fact the best way to know a place is just to walk around and do everyday things liking eating, shopping, socializing and relaxing, just as the locals would The best is not knowing exactly where I'll be or what I'll be doing, and just going with the flow and letting things unfold spontaneously. One of the most exciting things about travelling is discovering things on my own rather than what the guidebooks tell me. My favourite part of travelling to a different place is to wander around and discover little hidden nooks, streets, local shops and eateries that only the locals know about. I like to be free and spontaneous. I don't like to follow other people's schedules – they are too confining and leave no room for the unexpected. When I'm on vacation, I just do whatever I want, however I want and have a good time. I like to do things that are unique and spontaneous, things that other travellers would never think of doing.