

CONFIDENTIAL

SOUTH KOREA STRATEGIC REPORT 2023 GLOBAL TRAVELLER RESEARCH PROGRAM



CANADIAN TOURISM DATA
collective

Focus of This Report

- *Study Overview*
- *Key Insights*
- *Overall Travel Outlook & Trends*
- *Canada vs. Competitive Destinations*
- *Increasing Fall & Winter Visitation*
- *Sustainability*
- *Indigenous Tourism*



Study Overview: South Korea Market



The target population are residents aged 18 years and older who have taken a long-haul pleasure trip, where they had stayed at least 4 nights with a minimum of 1 night in paid accommodations in the past 3 years, or plan to take such a trip in the next 2 years.

HVG Audience Definition: Frequent travellers who are likely to travel long-haul in the next two years and either earn 6M KRW+ household income per month or are retired.





Timing of Fieldwork

December 8th – 26th 2023



Geographical Definition for Qualified Trips

Outside of: East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)



Sample Distribution

Sample distribution:	National
High Value Guest (HVG) Audience:	439
Other travellers:	1164
Total sample size:	1603

TOTAL SOUTH KOREA PERSPECTIVE

Where applicable, insights are drawn from two of YouGov’s proprietary syndicated data products, YouGov Global Travel Profiles and YouGov DestinationIndex to provide overall trends among the population of Total South Koreans 18+

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.
 - As a result, no trending is available for the South Korean market.





Travel Outlook & Trends

- The **appetite for travel** in South Korea is **high** for both **domestic** and **international vacations**, with **growth** in **planned international vacations** compared to a year ago
- Among South Korean HVGs, **international holidays** are taken at a rate **comparable** to that of **domestic trips**; four in ten **add personal holidays** to business trips and three in ten **work remotely** during holidays
- **Travel demand** is highest in the **Fall months**, when 11.4M typically travel, including 3.4M HVGs
- When South Koreans travel, **flights and accommodations** are most likely **booked through a travel agent or tour operator**
- Travellers express a **high level of concern** as it relates to both **international conflict or unrest** and **weather-related impacts** on travel plans; in the past 3 years, approximately **one in five** have had to **change travel plans** as a result



Canada vs. Competitive Set

- **Past visitation for Canada trails behind** most competitive destinations, ranking 9th in terms of ever visited by total South Korean travellers and HVGs
- **The next 2-year immediate potential for Canada is 8.2M**, including 3.0M HVGs
- **Past visitors** have a **strong affinity** for Canada, with NPS scores ranking 2nd among total travellers and HVGs. Also, Canada's **NPS is highest** among those who visited in the **Winter**, followed closely by Fall and Spring
- **Despite being the most visited**, the **US** ranks on the **bottom half of the list** at 7th for NPS
- Currently, **Canada** stands out as a **safe, environmentally-friendly country** that offers **activities that are physically challenging**, has **beautiful outdoor scenery and landscapes**, and is **a great place to see wildlife**
- Conversely, **Canada under-indexes** on as a place where I can **explore several different cities or regions in one trip**, a great place for **shopping and browsing through stores**, has **great dining and food experiences**, has **a great arts and music scene**, has **appealing festivals and events**, its cities have **a great atmosphere**, has **great historical or heritage sites and experiences**, and **has a culture that I would want to experience**





Key Drivers & Opportunities

- The **top drivers of consideration** are: *offering good value for money* and *great place to see wildlife*
- **Secondary drivers** that represent **white space opportunities** include: *a place I want to visit with my family* and *having transport options that make it easy for me to get to from where I live*
- Among HVGs, the **top drivers** of consideration are: *trending as a must-visit spot* and *a place I want to visit with my family/friends*
- **All brand value statements** fall towards the **bottom of the drivers list** among total travellers but **importance** of being a *place where the people are welcoming* and *a good place to live* are **higher among HVGs**
- Among HVGs, *being a place I want to visit with my family* is a **key opportunity area** for Canada to focus on. This dimension is considered a **white space** that no destination owns and has a strong influence in destination consideration
- Of note, **Canada** currently has a **weakness** for *having a culture that I would want to experience*, which is considered an important driver of consideration, as such is **another area to be addressed**



Fall/Winter Travel

- There is an **opportunity for Canada to attract more visitors** in the Fall and Winter, with 11.4M and 6.3M who typically travel during these respective months
- **Canada ranks 5th** as a destination that comes to mind when thinking of **Fall**, and **ranks 7th** when thinking of **Winter** – however **it only trails destinations within Asia**
- **Interest is stronger in Fall holidays**, with 34% expressing extreme interest and **6.4M travellers considering a visit to Canada** in the Fall in the next two years
- Although **interest in Winter holidays is lower**, **conversion** between those who typically travel during Winter and interest in taking a trip to a destination's Winter season is **comparable to Fall travel**. Furthermore, **Canada has strong potential to convert** those who are extremely interested in travelling during both seasons.
- Leveraging **the Northern lights, natural attractions, city sightseeing** and **culinary experiences** could help **increase consideration in the Fall/Winter months** as they are top experiences that travellers in South Korea are interested in while visiting Canada

Sustainable Travel

- While **sustainability** is only a **moderate priority** for most South Korean travellers, **being perceived as a socially-responsible** travel destination can **drive consideration**
- Currently, **one third of travellers** and **almost four in ten HVGs** associate Canada with **being a socially responsible destination**. Canada **out-scores top competitors US and Australia** but **trails Switzerland** on this dimension
- **Efforts that carry the greatest importance** are conservation of natural areas, knowing the destination is open and welcoming to travellers and having eco-friendly transportation options and accommodations available
- There is a **perception** that sustainable travel is **more expensive** and there is a **lack of information around it**. **HVGs** in particular **are more likely** to say travelling sustainably would **limit the types of activities they can do**
- To **capitalize** on this opportunity, **communications highlighting** Canada's **sustainability efforts** and **educating travellers** could play a crucial role in leveraging this area to increase consideration of Canada as a destination



Indigenous Tourism

- Among South Korean travellers, **Canada is not considered a top destination** for Indigenous tourism; Japan and China are most mentioned
- The **culture**, followed by **ecotourism and the environment** and **food and drinks** are the **top activities** that come to mind when it comes to Indigenous tourism
- When thinking of Indigenous cultural experiences and tourism activities in Canada, **interest is strongest** for **more general experiences** such as sampling food and drink and excursions in nature
- **Interest is lower** for visiting **remote locations**, **learning about residential schools**, or activities such as **hunting/fishing with an Indigenous outfitter**
- **HVGs** have a **higher interest overall** in Indigenous activities



Overall Travel Outlook & Trends

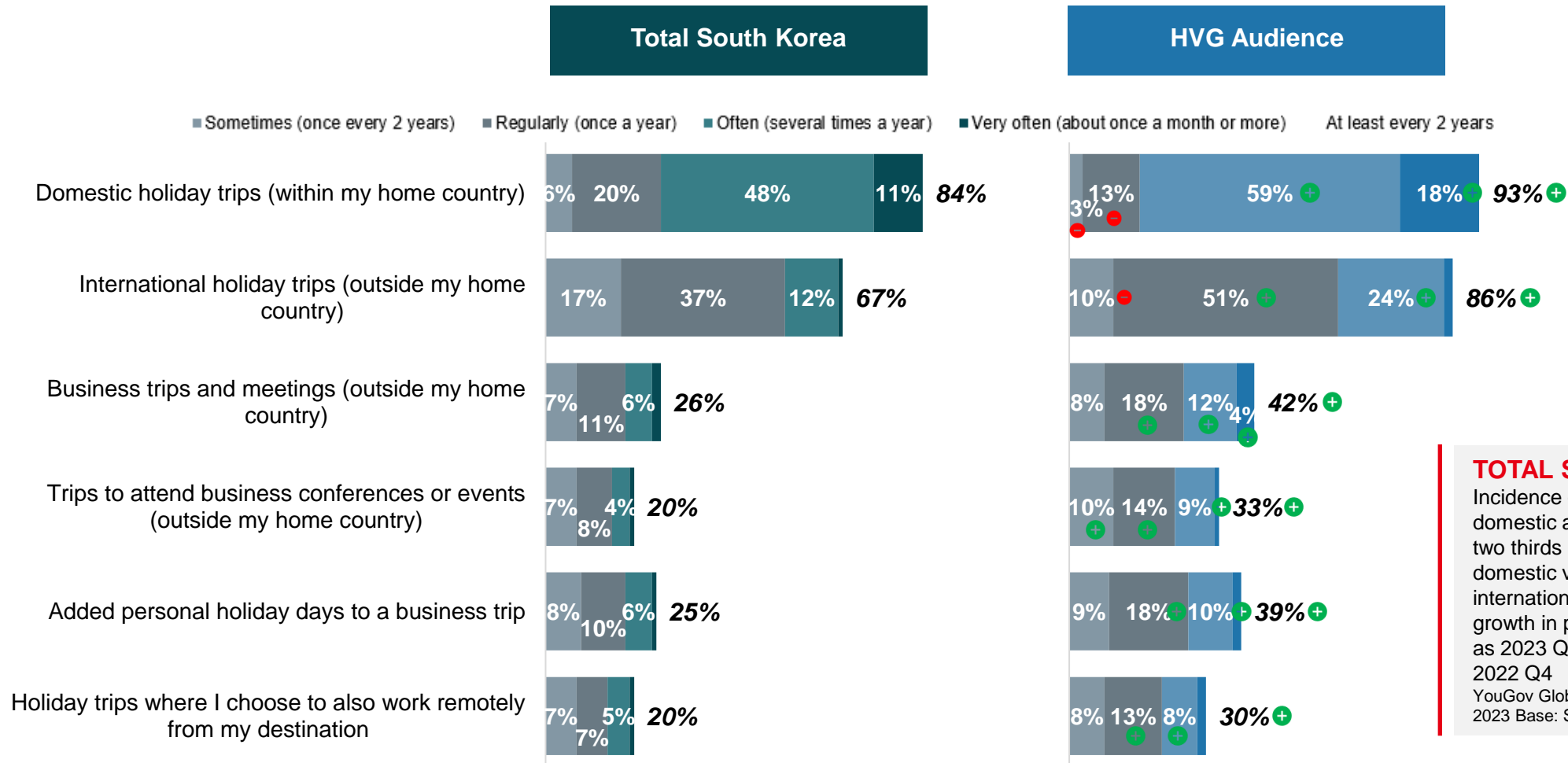


 Toronto
Ontario



Types of Travel Trips

Domestic holidays are taken more frequently than international holidays among total South Korean travellers. Among HVGs, international holidays are more comparable to domestic trips; four in ten HVGs add personal holidays to business trips and three in ten choose to work remotely during holidays.



TOTAL SOUTH KOREA
 Incidence of trip planning is high for both domestic and international vacations with two thirds of South Koreans planning a domestic vacation and half planning an international vacation. There has been growth in planned international vacations as 2023 Q4 scores are up compared to 2022 Q4
 YouGov Global Travel Profiles (South Korea) – 2023 Base: South Koreans 18+

Overall Demand for Long-Haul Pleasure Travel



$$\begin{array}{ccccccc}
 \text{Total Population 18+} & & \text{Long-Haul Traveller} & & \text{Size of Target Market} & & \text{HVG} & & \text{Size of HVG Population} \\
 44,644,00 & \times & \text{Incidence Rate} & = & 21,652,500 & \times & 26.7\% & = & 5,781,000 \\
 & & 48.5\% & & & & & &
 \end{array}$$

Total South Korea

HVG Audience

Potential Market Size

Total potential long-haul pleasure travellers aged 18 years or more

Target Market for Canada

Immediate Potential for Canada



X 79.9%
Dream to purchase Stage for Canada

X 47.4%
Likely to visit Canada in the next 2 years¹

Total potential HVG travellers aged 18 years or more

HVG Target Market for Canada

HVG Immediate Potential for Canada



X 86.0%
Dream to purchase Stage for Canada

X 61.2%
Likely to visit Canada in the next 2 years¹

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1603); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1279)

Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience (n=439); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=377)

¹Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
 C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
 E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

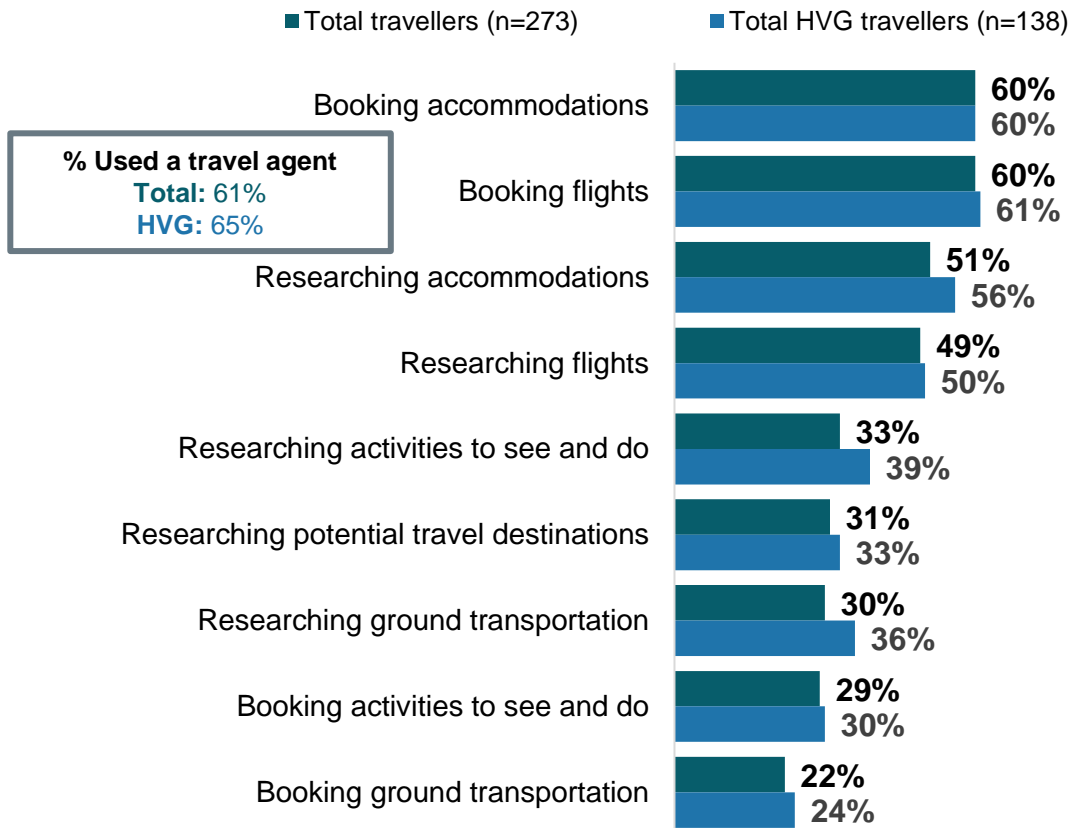


Travel Agents/Tour Operator Usage For Recent Trip

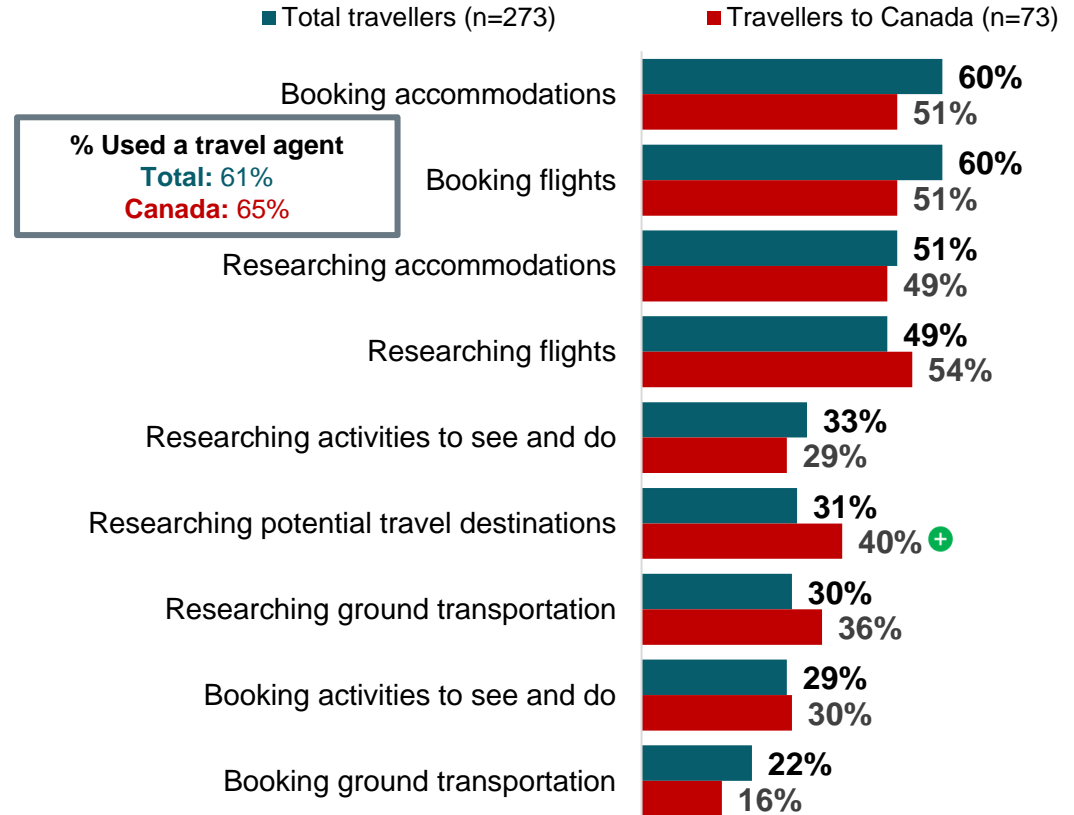


Among those who used a travel agent/tour operator, the most used services are the booking of accommodations and flights. Usage of a travel agent/tour operator is similar among travellers to Canada, but there is greater use to help research potential travel destinations.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



Total Travellers to Any Destination vs. Total Travellers to Canada



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=273); HVG (n=138); Travellers to Canada (n=73)

F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Hanatour or Interpark or Lotte Tour, they do not include online booking engines like Skyscanner or NAVER Flight. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)

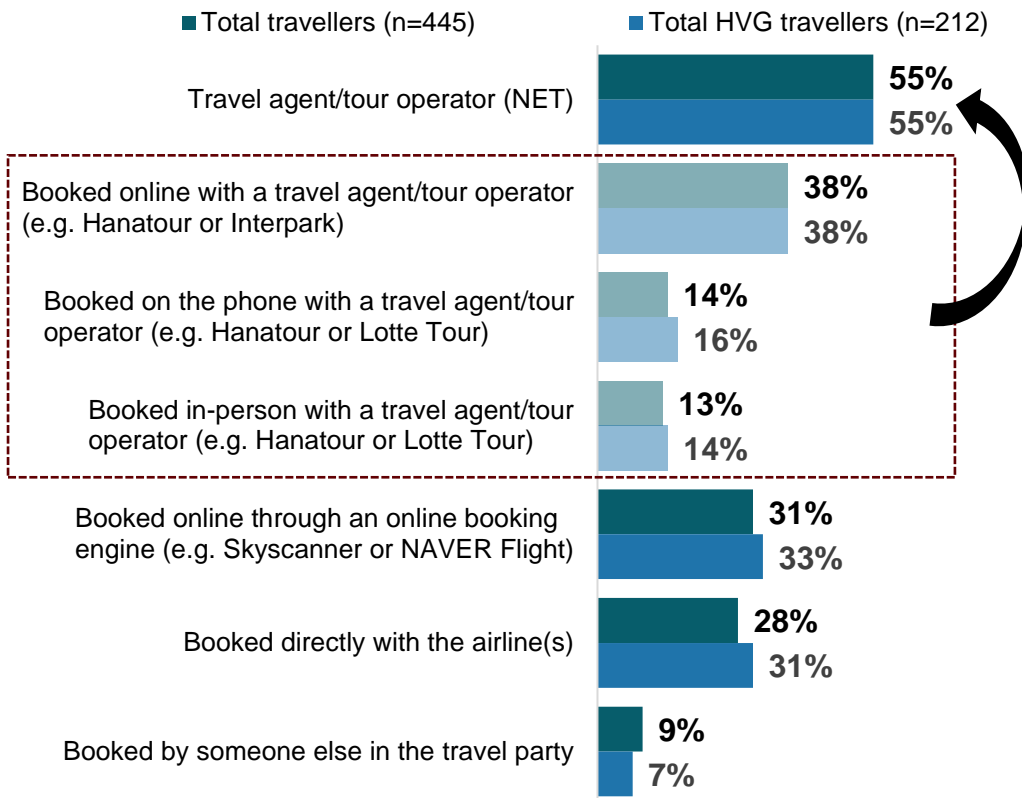
F10. Which of the following did a travel agent or tour operator help you with?



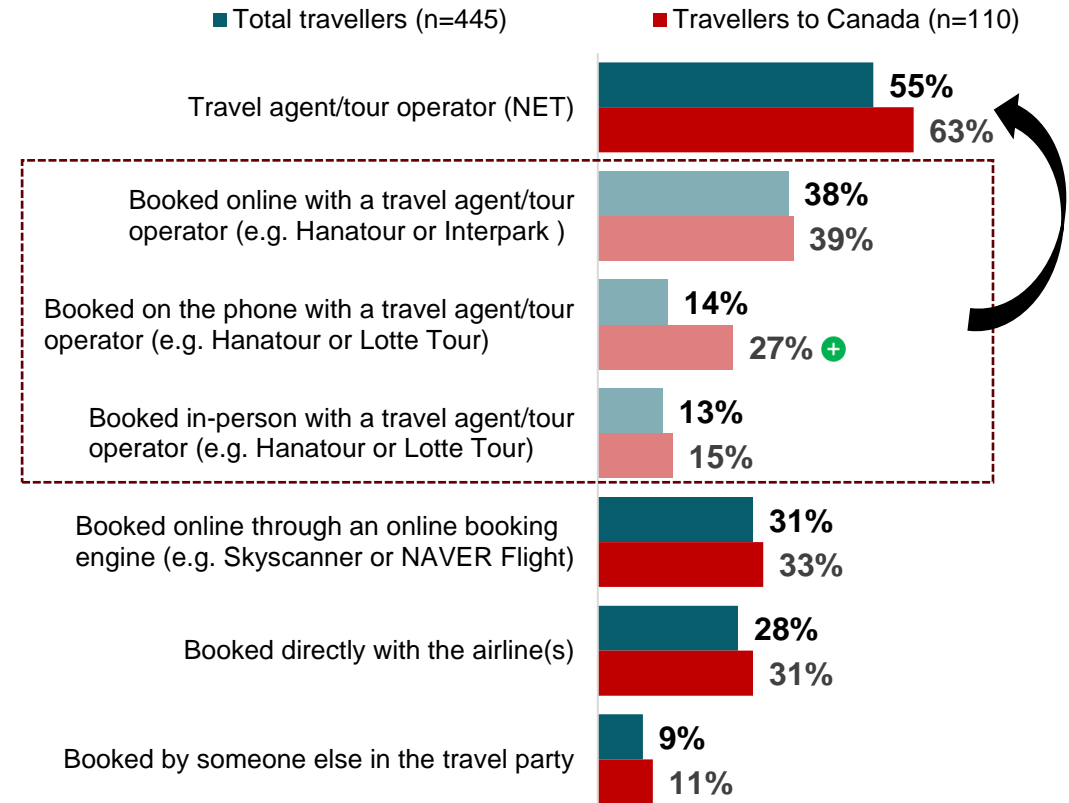
Booking Flights For Recent Trip

South Korean travellers, HVGs, and travellers to Canada are most likely to book flights through a travel agent/tour operator.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



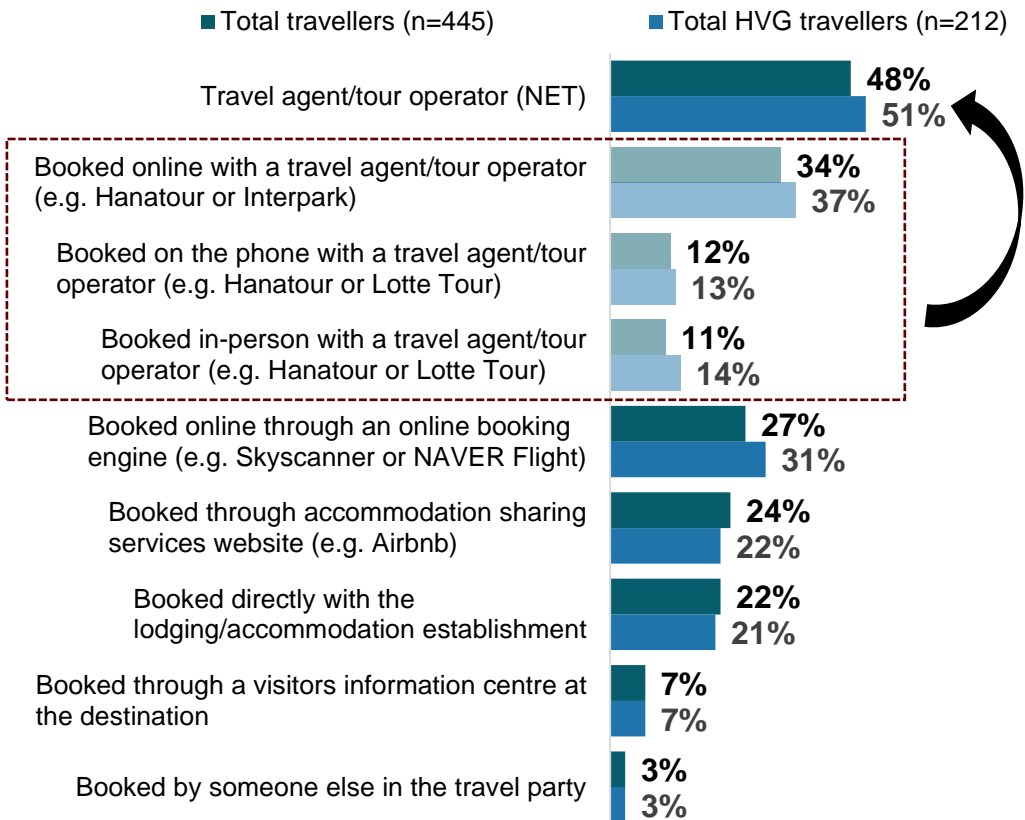
Total Travellers to Any Destination vs. Total Travellers to Canada



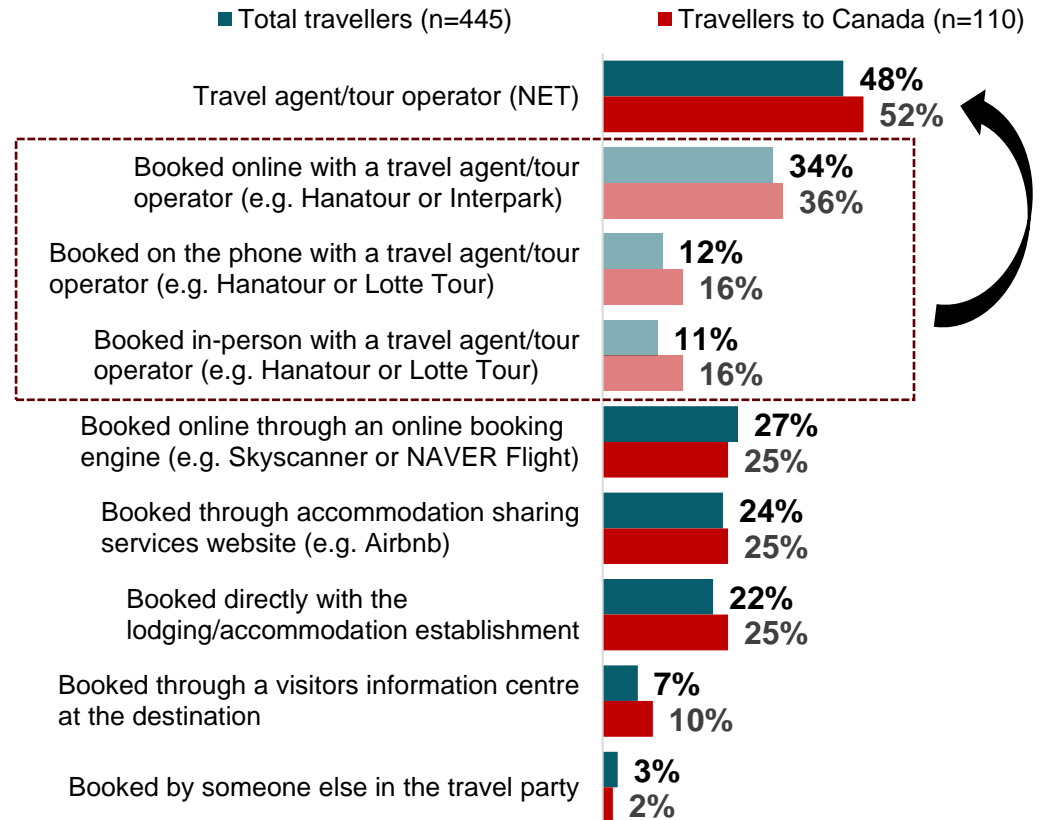
Booking Accommodations For Recent Trip

South Korean travellers, HVGs, and travellers to Canada are also most likely to book accommodations through a travel agent/tour operator.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination



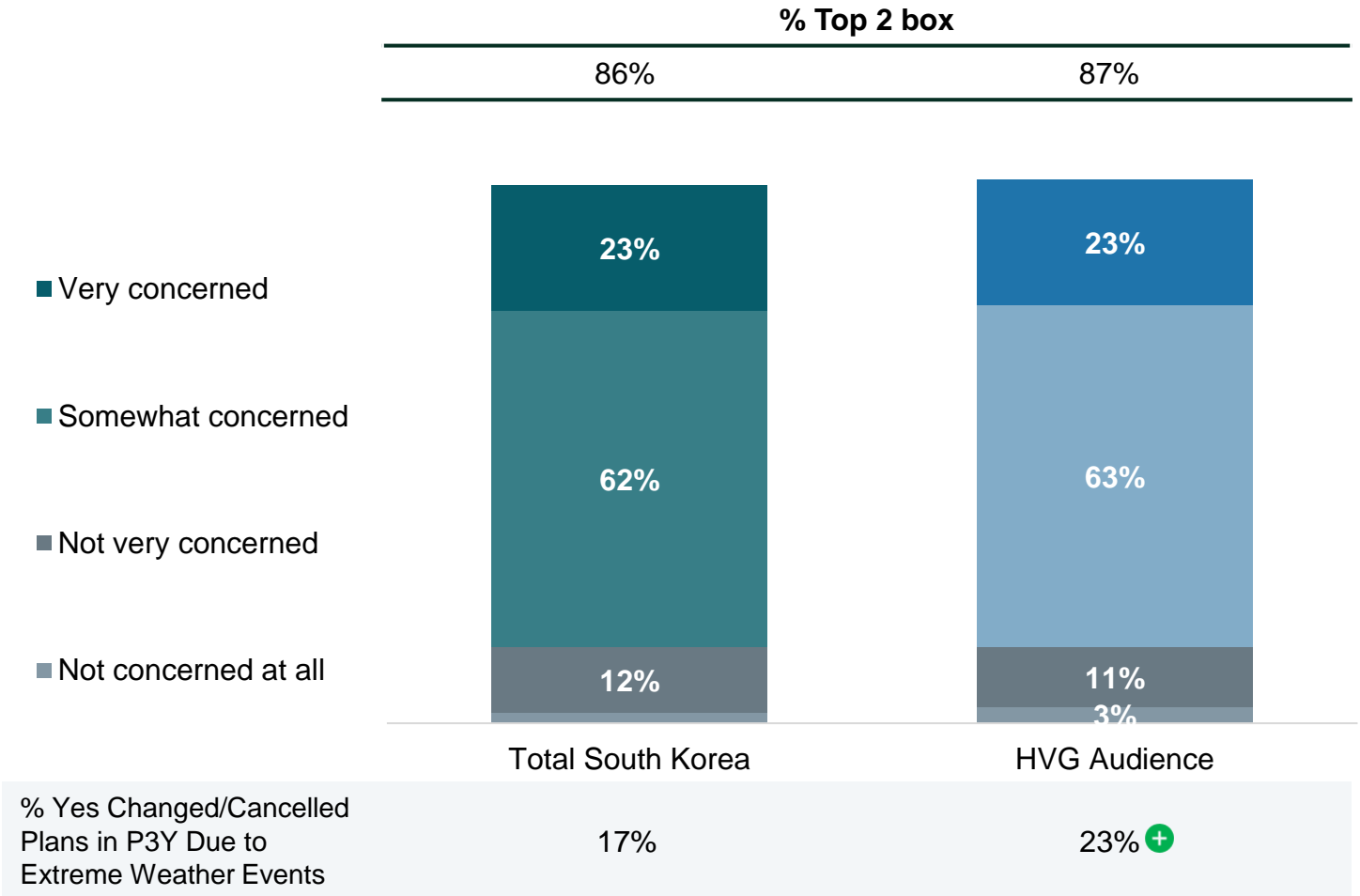
Total Travellers to Any Destination vs. Total Travellers to Canada



Impact of Extreme Weather Events on Travel Plans



Extreme weather events are a concern to the large majority of travellers in South Korea, with over eight in ten either somewhat or very concerned. HVGs were significantly more likely to have changed plans in the past 3 years due to weather.



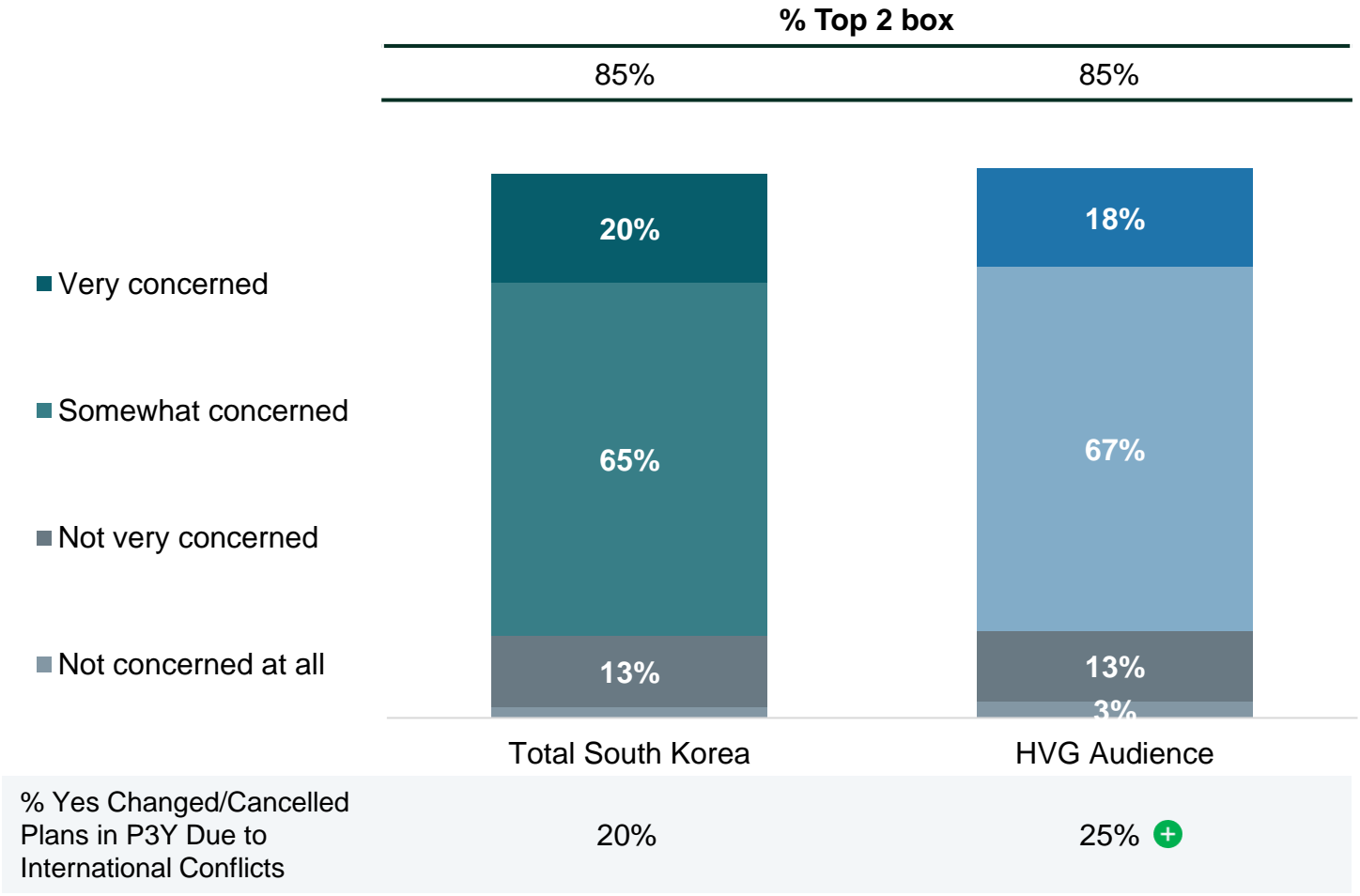
Extreme Weather Events Description

As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones.

13 Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=832); HVG (n=227)
 D10. [DESCRIPTION] How concerned are you about extreme weather events affecting your travel plans?
 D11. In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?

Impact of International Conflicts & Unrest on Travel Plans

International conflicts are also a concern for the majority of travellers in South Korea, with over eight in ten either somewhat or very concerned. HVGs were also significantly more likely to change their plans in the past 3 years due to international conflicts.



TOTAL SOUTH KOREA
 The disruption of major air routes due to the Russian airspace ban is affecting travel, Availability of transportation is mentioned by over one in three South Koreans as a destination choice influence and concerns about safety is a top 3 barrier to travel.
 YouGov Global Travel Profiles (South Korea) – 2023 Base: South Koreans 18+

International Conflicts Description
 As you may or may not be aware, international conflicts and unrest are currently occurring in different regions around the world.


Note: respondents were asked either about extreme weather events (D10/D11) or international conflicts & unrest (D12/D13)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=771); HVG (n=212)
 D12. [DESCRIPTION] How concerned are you about international conflicts or unrest affecting your travel plans?
 D13. In the past 3 years, have you ever had to change plans or cancel a trip due to international conflicts or unrest?





Canada vs. Competitive Destinations



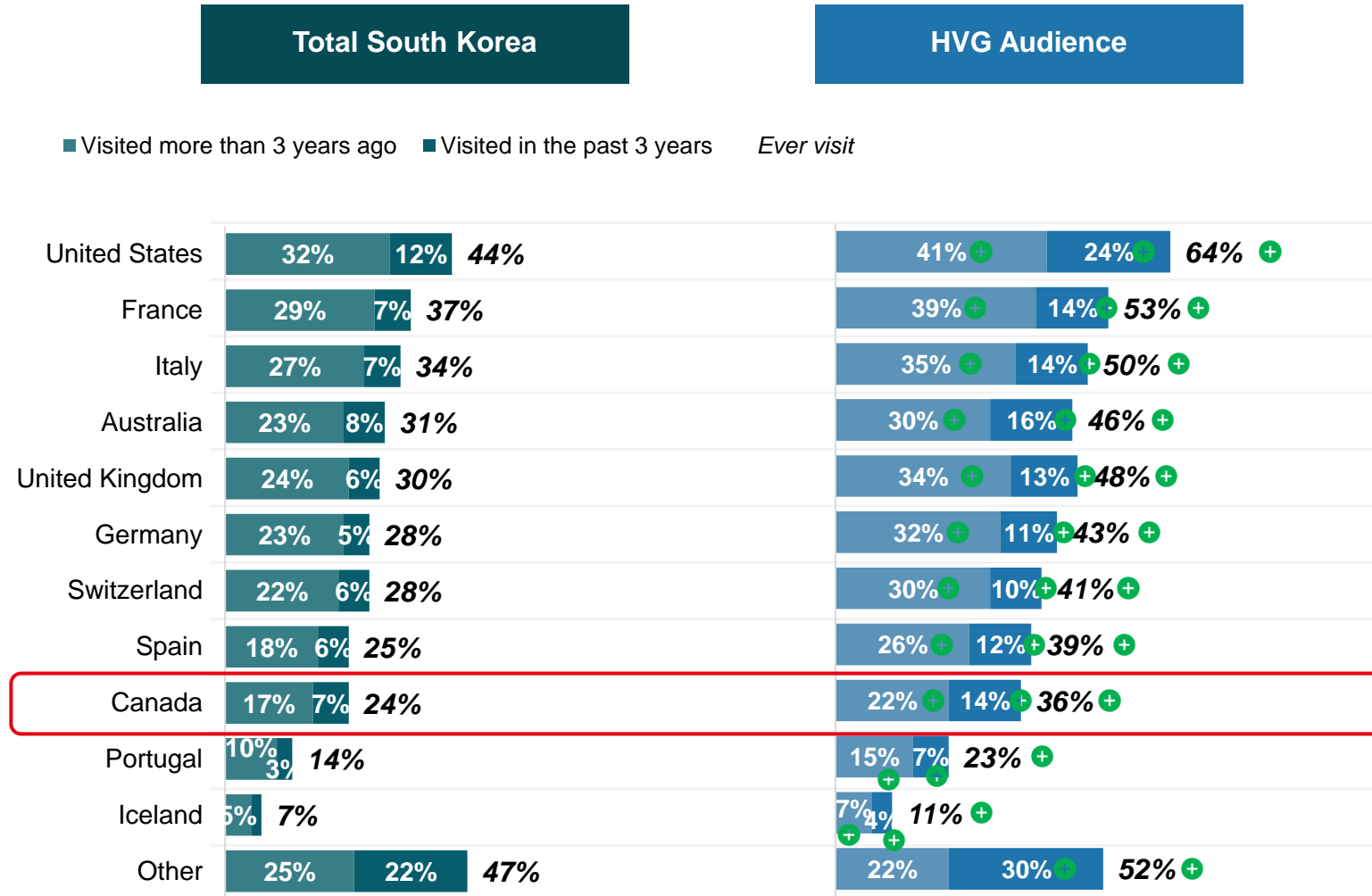
 Peggy's Cove
Nova Scotia



Past Visitation



Canada ranks 9th among competitive destinations ever visited by South Koreans for both total and HVG audience. HVGs are more likely to have ever visited all competitive destinations. Of note, more recent visitation to Canada in the past 3 years is comparable to that of European destinations and Australia.

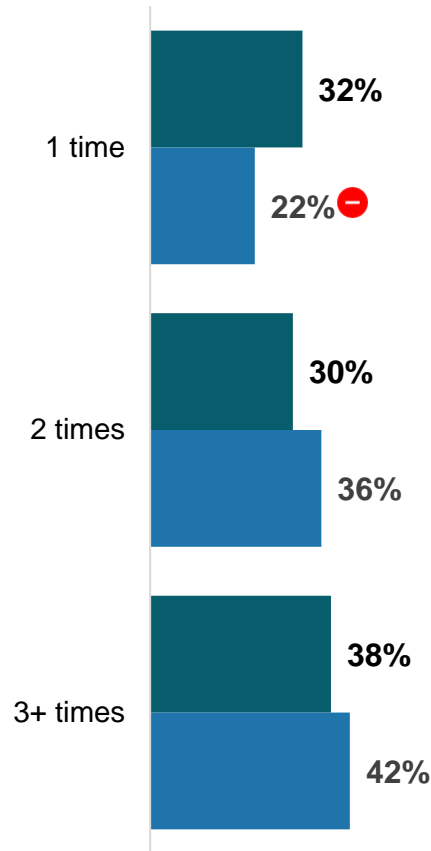


Number of Visits Ever & Time of Year Visited Canada

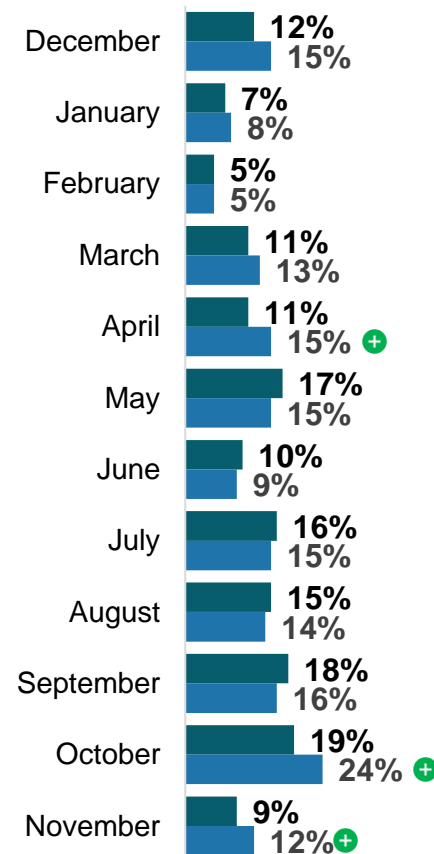


Among those who have ever visited Canada, about four in ten have visited Canada at least three times. Travellers were most likely to have visited in the Fall, followed closely by Summer and Spring.

■ Total Travellers ■ Total HVG Travellers



■ Total Travellers ■ Total HVG Travellers



	Total Travellers	Total HVG Travellers
Winter	20%	22%
Spring	32%	36%
Summer	34%	30%
Fall	37%	43%

17 Base: Long-haul pleasure travellers (past 3 years or next 2 years)
 F19. Approximately, how many times have you been to Canada? Ever Visited Canada (excluding None) (n=160); HVG (n=59)
 F20. What time of year have you ever visited Canada? Select all that apply. Visited Canada (n=384); HVG (n=159)

South Korea GTRP – December 2023
 + / - = significantly higher/lower result (vs. Total)

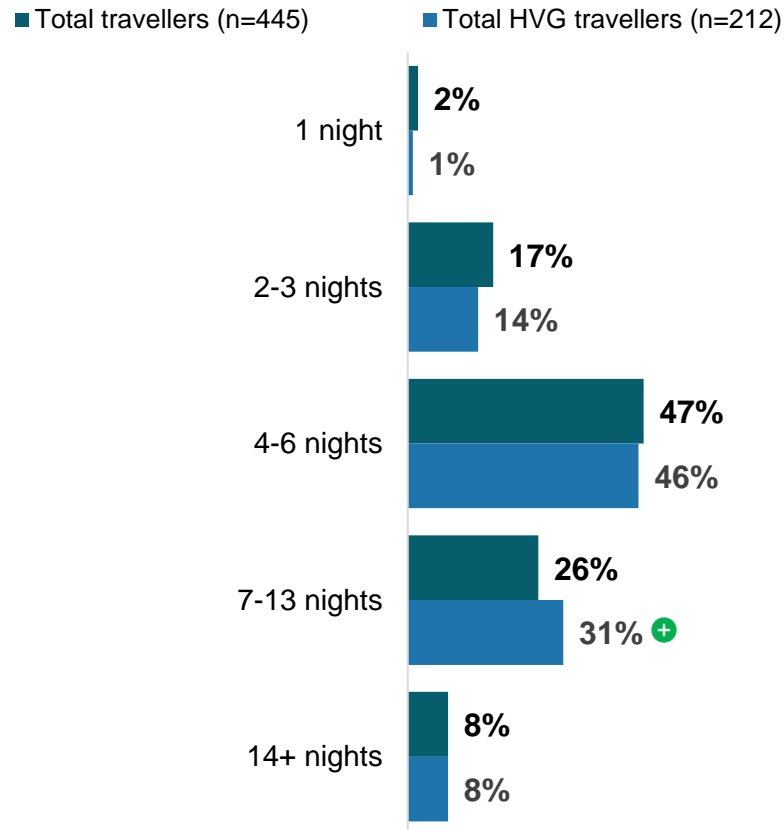


Nights Spent During Recent Trip

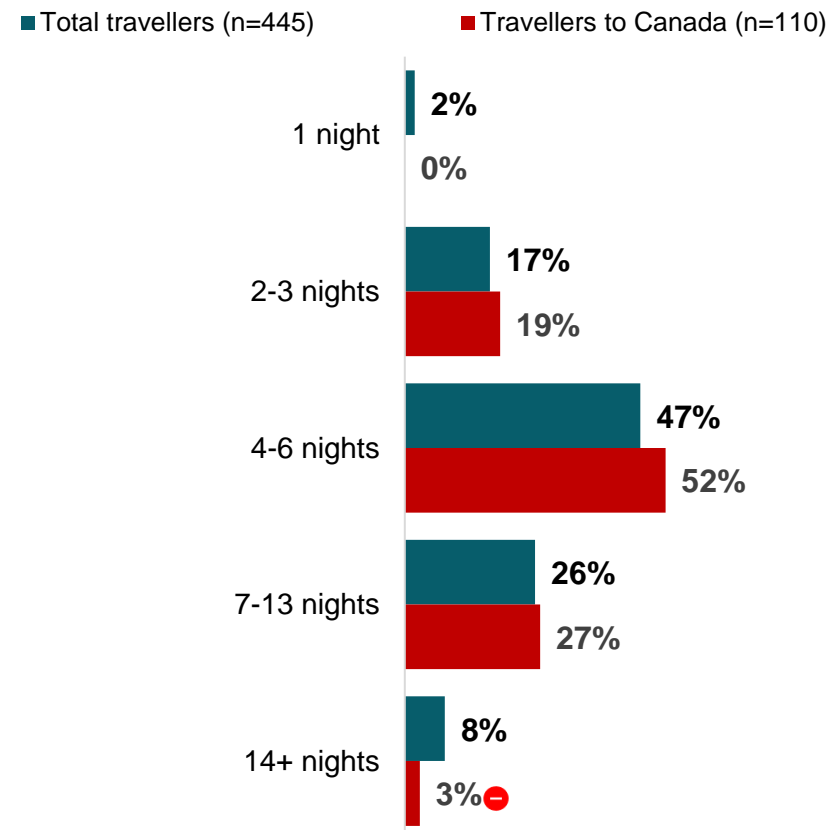


Majority of South Korean travellers stayed for at least 4 nights during their most recent trip to Canada, with about half staying between 4 to 6 nights.

Total Travellers to Any Destination vs. HVG Travellers to Any Destination

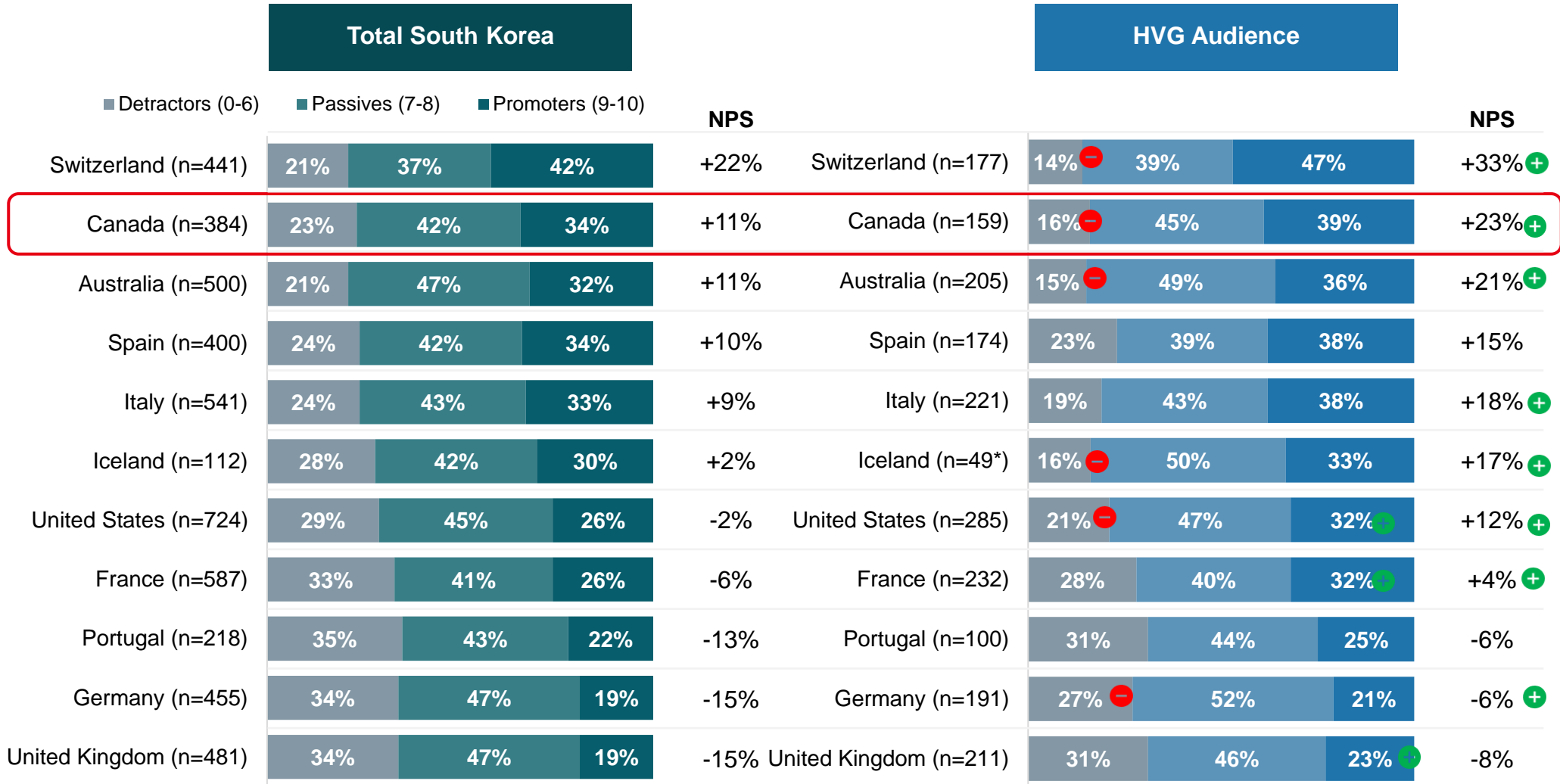


Total Travellers to Any Destination vs. Total Travellers to Canada



Net Promoter Score (NPS)

Among those who have ever visited each destination, Canada ranks second on NPS among both total South Korean travellers (tied with Australia) and the HVG audience. Despite being the most visited, the US ranks on the bottom half of the list at 7th.



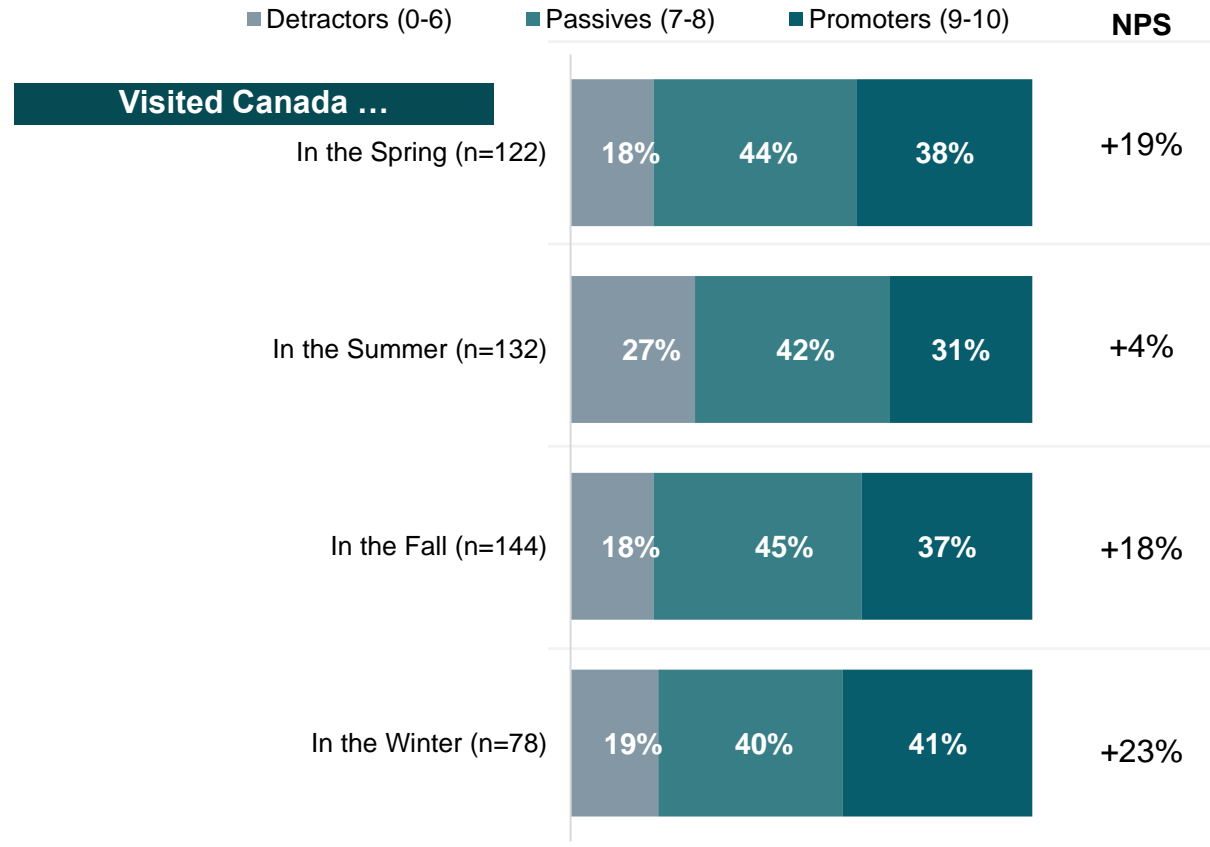
Note: all respondents evaluated countries they have ever visited from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited [DESTINATION]
 C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
 *Small base size, interpret with caution (n<50)



Canada Net Promoter Score (NPS) by Season



Canada's NPS is highest among those who visited in the Winter, followed closely by Fall and Spring.



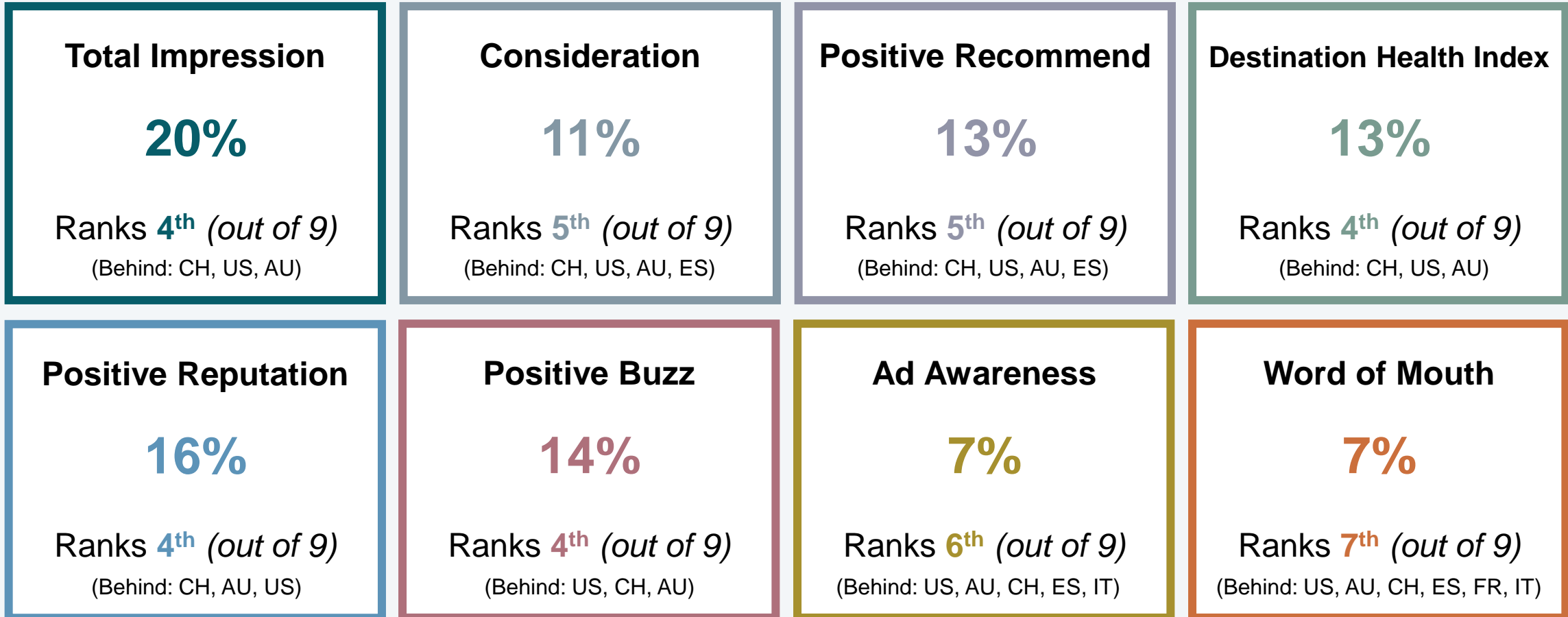
Note: all respondents evaluated countries they have ever visited from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited **Canada**
 C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?
 F20. What time of year have you ever visited Canada? Select all that apply.



Performance Scorecard for Canada



Canada struggled in South Korea in 2023, ranking outside the top three (out of 9 destinations) in all metrics. Switzerland, the US and Australia rank in the top three for all metrics.



TOTAL SOUTH KOREA

Competitive set: Switzerland, US, Australia, Spain, Italy, France, UK, Germany

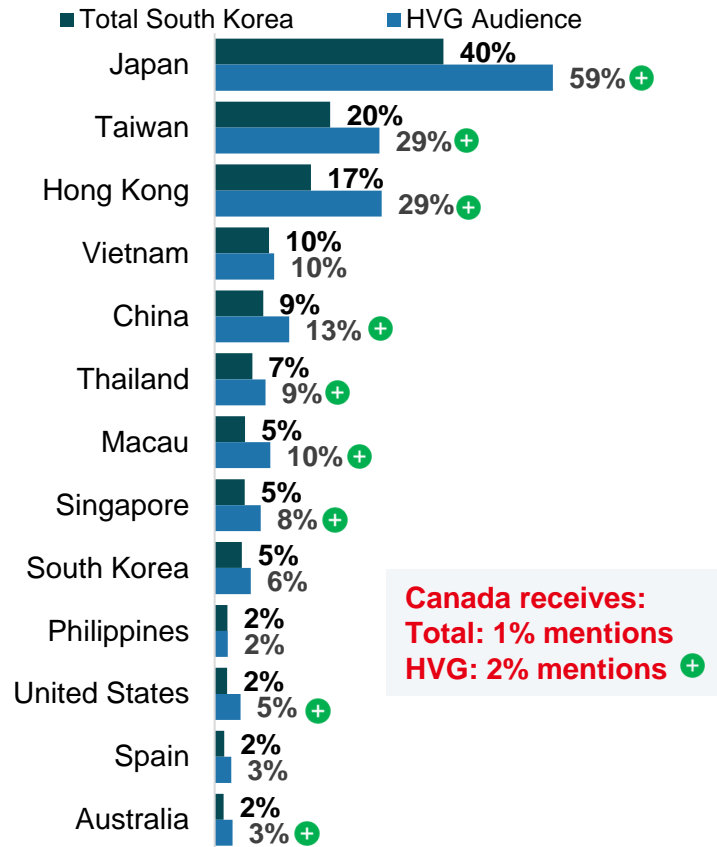


Unaided Long-Haul Destination Consideration (Next 2 Years)

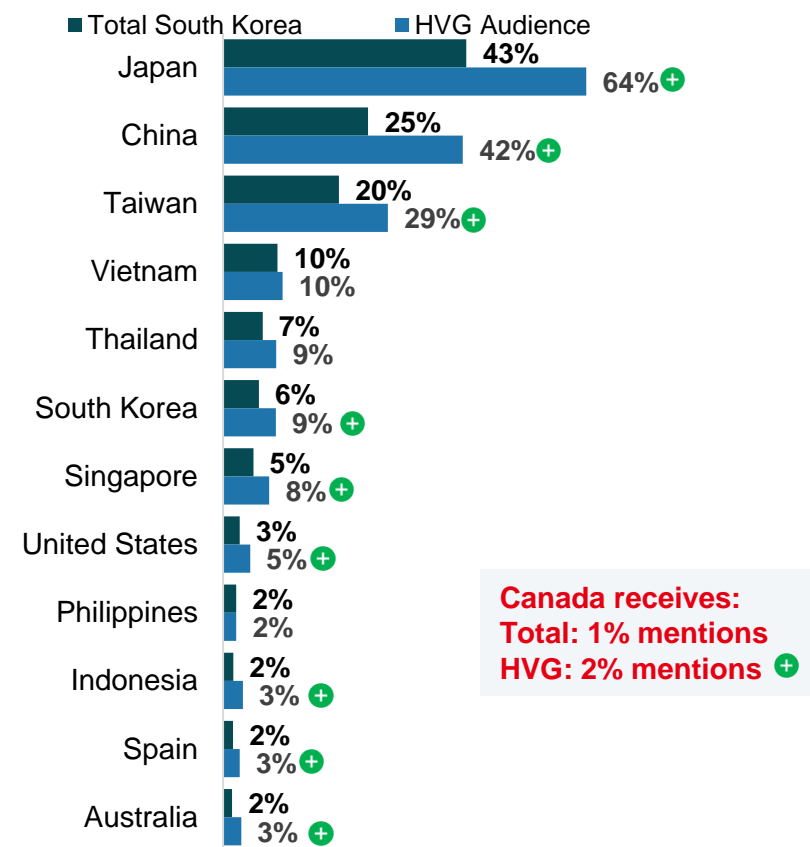


Canada receives little mentions as a destination being considered by South Korean travellers on an unaided basis. Preference is strongest for travelling to adjacent Asian destinations. The most mentioned destination outside of Asia is the US.

Top Destination Brands¹



Top Destinations²



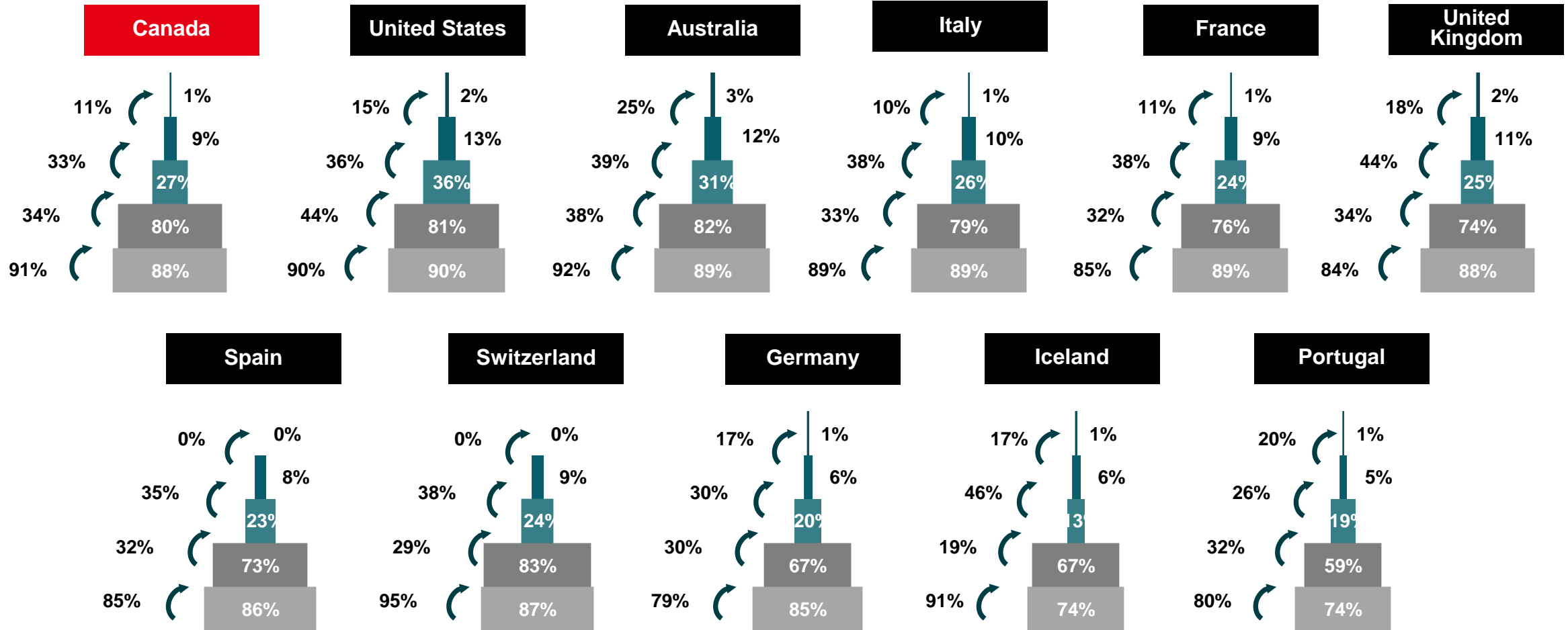
¹Responses as mentioned by respondents (e.g., percentage who said "Canada" specifically).
²Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603); HVG (n=439)
 B1. You mentioned that you are likely to take a long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)



Consideration Funnels: Total South Korea Travellers



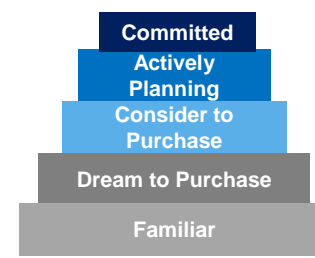
About one in four South Korean travellers are seriously considering Canada as a travel destination; ranking behind the US and Australia.



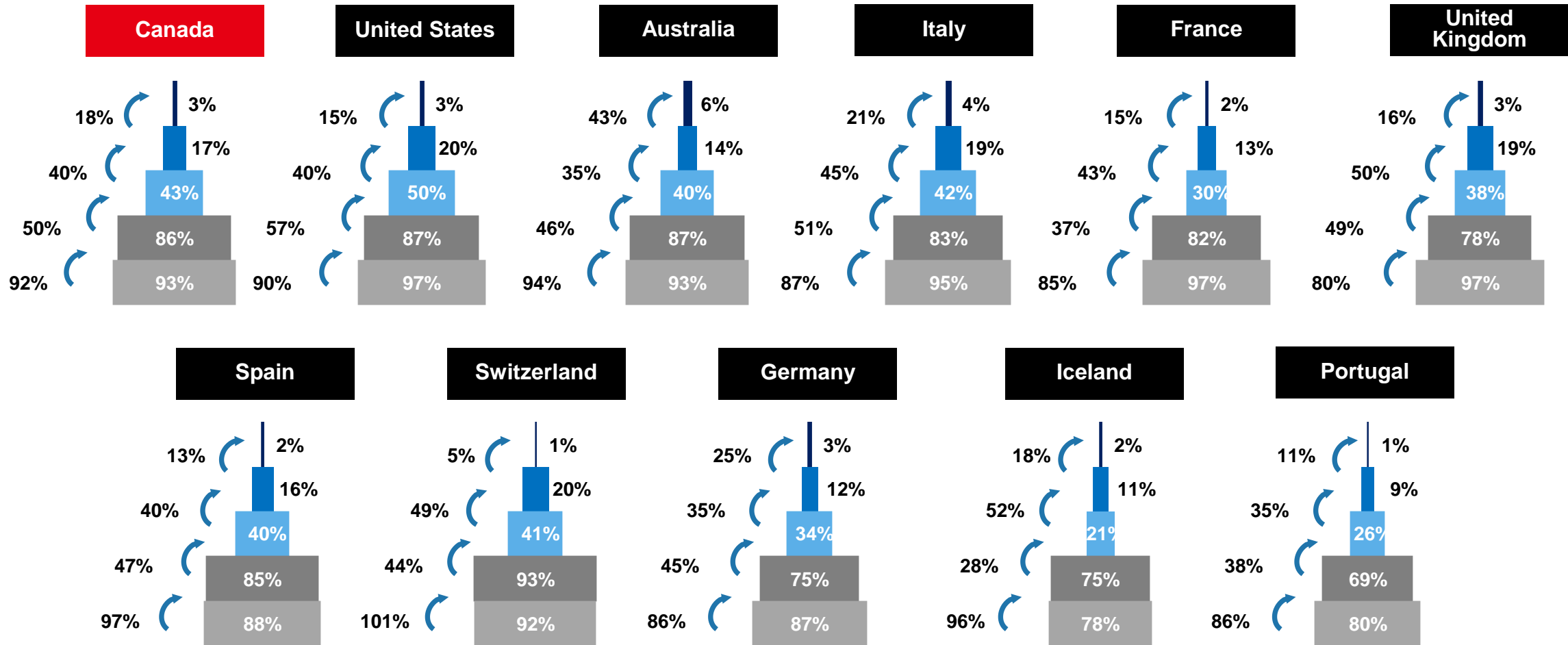
23 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION] See notes for question wording and funnel definitions



Consideration Funnels: Among HVG Audience



Compared to total South Korean travellers, Canada has higher consideration rates among HVGs, and ranks higher than Australia compared to total South Korean travellers.



Destination Consideration By Seasons



When looking at consideration by season, Canada's consideration is highest for Fall, followed by Summer. Amongst the competitive set, Canada has the highest consideration for travel during the Fall (37%).

Total South Korea	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=397)	37%	29%	24%	30%
Canada (n=1279)	23%	27%	32%	37%
France (n=364)	19%	36%	29%	30%
Germany (n=324)	17%	35%	33%	31%
Iceland (n=321)	31%	21%	30%	21%
Italy (n=378)	16%	38%	30%	34%
Portugal (n=284)	20%	40%	26%	33%
Spain (n=354)	19%	34%	30%	28%
Switzerland (n=396)	24%	34%	33%	31%
United Kingdom (n=357)	18%	32%	32%	32%
United States (n=386)	19%	36%	26%	35%

HVG Audience	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
Australia (n=124)	39%	32%	25%	31%
Canada (n=377)	27% +	31%	35%	42% +
France (n=107)	22%	41%	33%	30%
Germany (n=101)	18%	40%	43% +	36%
Iceland (n=91)	34%	28% +	28%	21%
Italy (n=118)	19%	40%	32%	40%
Portugal (n=97)	23%	40%	25%	42% +
Spain (n=112)	17%	46% +	30%	25%
Switzerland (n=120)	24%	43% +	40%	33%
United Kingdom (n=106)	22%	39%	34%	34%
United States (n=103)	25%	41%	29%	39%

25

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years), Those in the dream to purchase stages of the path to purchase for [DESTINATION] C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years?

South Korea GTRP – December 2023

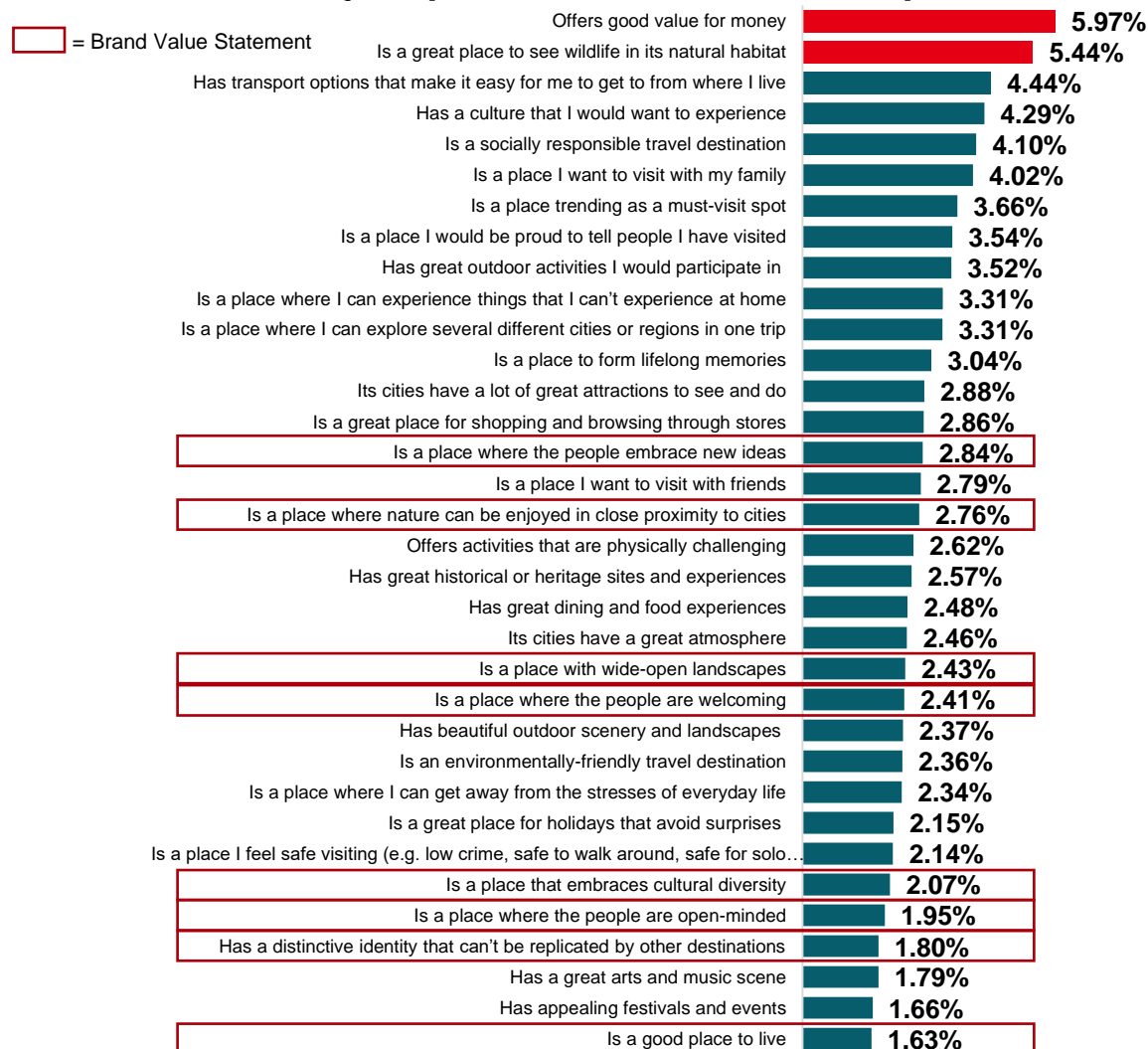
+ / - = significantly higher/lower result (vs. Total)



Destination Attributes: Drivers Analysis



The most influential aspects of consideration are offering good value for money and great place to see wildlife. Having transport options that make it easy for me to get to from where I live, has a culture that I would want to experience, is a socially responsible destination and a place I want to visit with my family are also important drivers.



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.



Destination Attributes – Relative Strengths & Weaknesses: Among Total South Korea



Canada stands out as a safe, environmentally friendly country that offers activities that are physically challenging, has beautiful outdoor scenery and landscapes, and is a great place to see wildlife. Conversely, Canada has several weaknesses, this includes having a culture that I would want to experience, an important driver of consideration.

		Canada	Australia	France	Germany	Iceland	Italy	Portugal	Spain	Switzerland	United Kingdom	United States
	n=	1603	481	480	481	481	482	480	482	480	481	481
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life					Strength						
	Is a place to form lifelong memories					Strength						
	Is a place I would be proud to tell people I have visited		Weakness									
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength					Weakness			Strength		Weakness
	Is a place where I can explore several different cities or regions in one trip	Weakness	Weakness			Weakness	Strength					
	Offers good value for money							Strength				
	Has transport options that make it easy for me to get to from where I live					Weakness						
Type of Trip	Is a place I want to visit with friends											
	Is a place I want to visit with my family											
	Is a great place for holidays that avoid surprises									Strength		
	Is a place where I can experience things that I can't experience at home					Strength						
	Is an environmentally-friendly travel destination	Strength	Strength	Weakness		Strength	Weakness		Weakness	Strength	Weakness	Weakness
	Is a socially responsible travel destination				Strength							
To-Do	Is a place trending as a must-visit spot					Weakness	Strength	Weakness				
	Offers activities that are physically challenging	Strength	Strength	Weakness		Strength	Weakness					
	Is a great place for shopping and browsing through stores	Weakness	Weakness	Strength		Weakness	Strength	Weakness		Weakness	Strength	Strength
	Its cities have a lot of great attractions to see and do	Weakness				Weakness				Weakness		
	Has great outdoor activities I would participate in		Strength	Weakness		Strength	Weakness					
	Has great dining and food experiences	Weakness	Weakness	Strength		Weakness	Strength			Weakness		
	Has a great arts and music scene	Weakness	Weakness	Strength		Weakness	Strength			Weakness	Strength	
	Has appealing festivals and events	Weakness	Weakness		Strength	Weakness			Strength	Weakness	Strength	
To-See	Its cities have a great atmosphere	Weakness	Weakness								Strength	
	Has beautiful outdoor scenery and landscapes	Strength	Strength			Strength				Strength	Weakness	
	Is a great place to see wildlife in its natural habitat	Strength	Strength	Weakness	Weakness	Strength	Weakness	Weakness	Weakness		Weakness	
	Has great historical or heritage sites and experiences	Weakness	Weakness	Strength	Strength	Weakness	Strength	Strength	Strength	Weakness	Strength	Weakness
	Has a culture that I would want to experience	Weakness	Weakness				Strength					

Strength Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set. Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION] C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.



Brand Value Statements: Among Total South Korea



Canada is seen as a place with wide-open landscapes, that allows one to enjoy nature close to cities, where people embrace new ideas, and is a good place to live. Three out of four are shared with Australia.

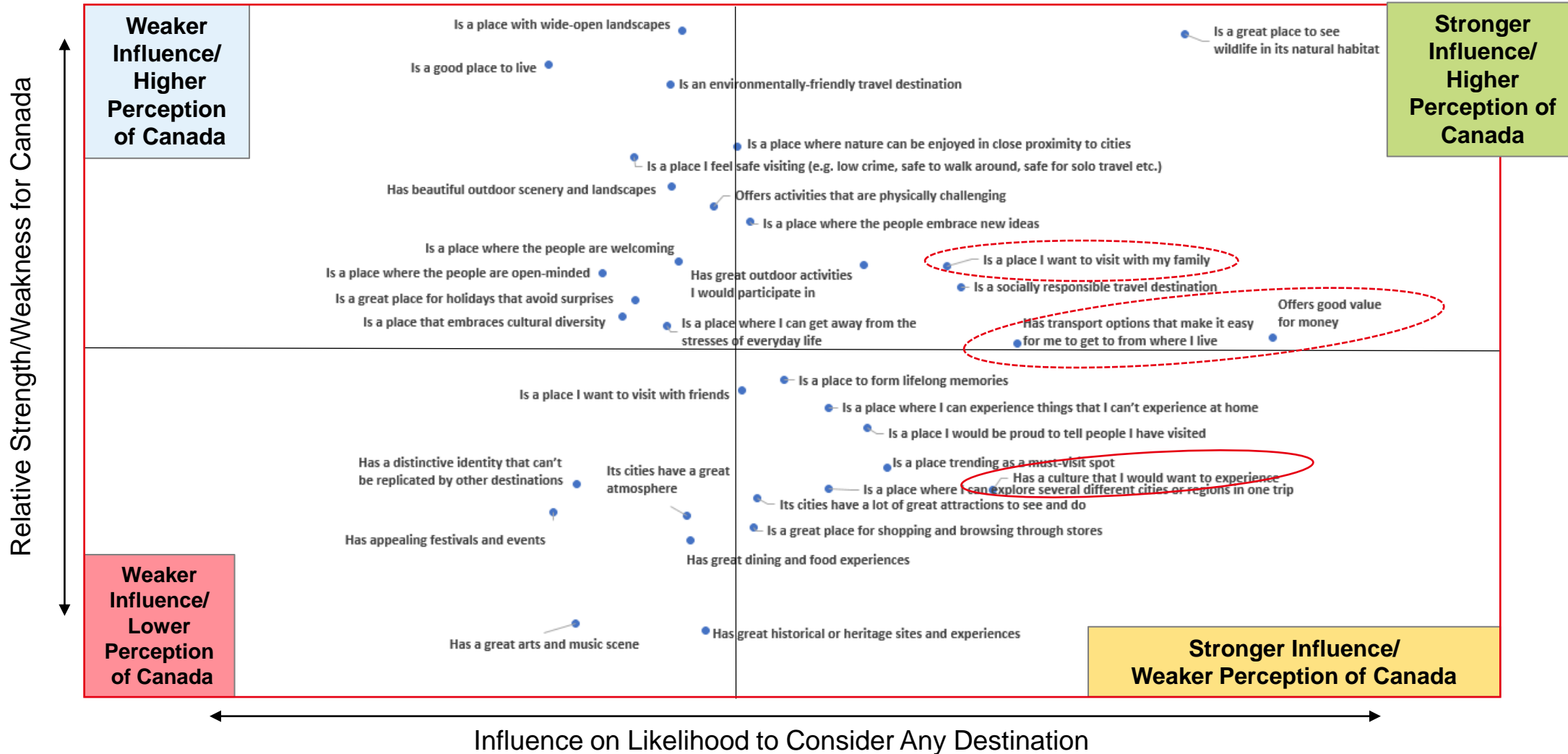
	Canada	Australia	France	Germany	Iceland	Italy	Portugal	Spain	Switzerland	United Kingdom	United States
n=	1603	481	480	481	481	482	480	482	480	481	481
Is a place with wide-open landscapes	Strength	Strength	Weakness	Weakness	Strength	Weakness	Weakness	Weakness		Weakness	Strength
Is a place where nature can be enjoyed in close proximity to cities	Strength	Strength	Weakness			Weakness			Strength	Weakness	
Is a place that embraces cultural diversity			Strength		Weakness				Weakness		Strength
Is a place where the people are welcoming											
Is a place where the people are open-minded					Weakness						Strength
Is a place where the people embrace new ideas	Strength										
Is a good place to live	Strength	Strength						Weakness	Strength		
Has a distinctive identity that can't be replicated by other destinations	Weakness				Strength						Weakness



Canada Strengths & Opportunities: Total South Korea



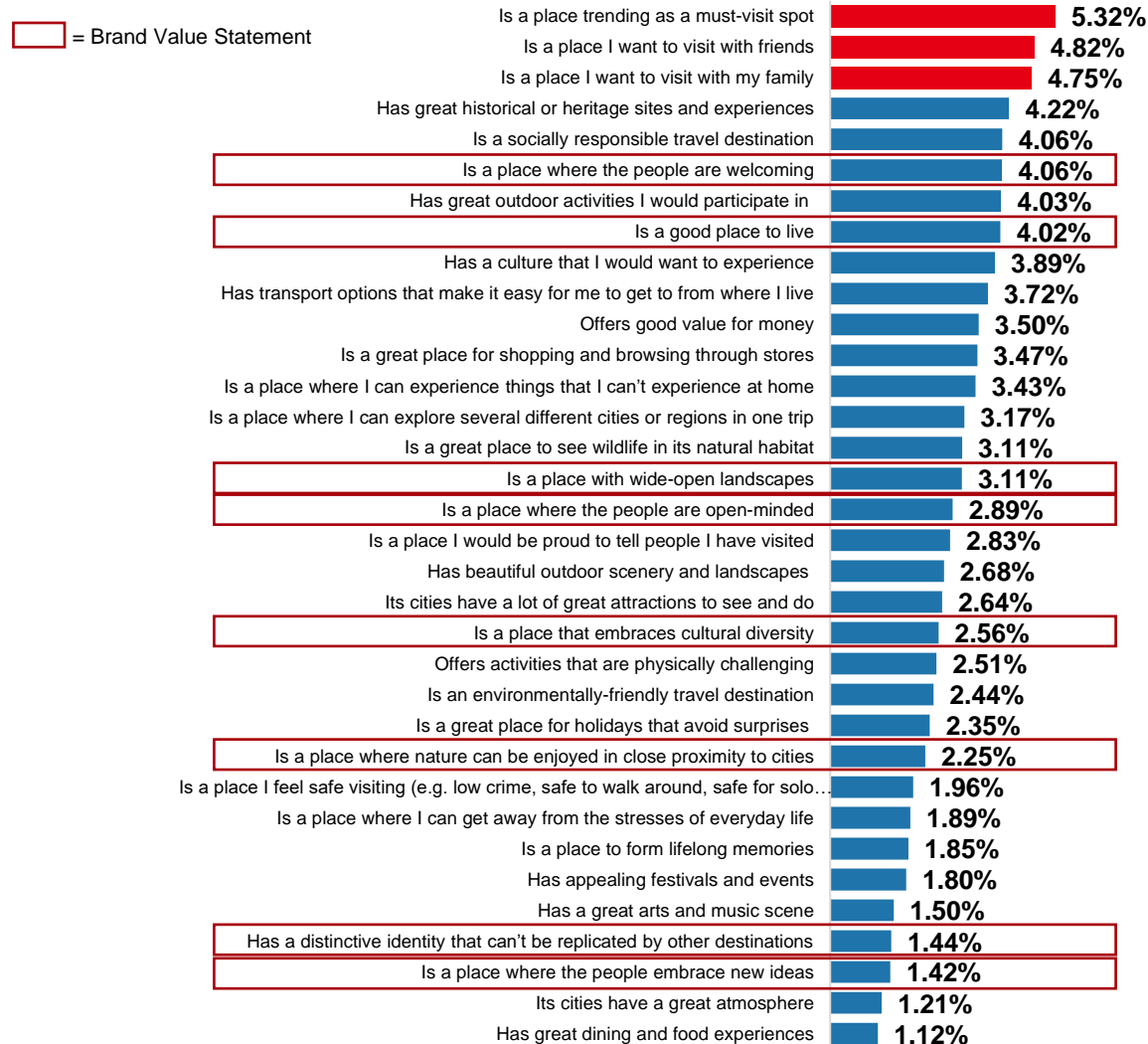
Given the strong influence on consideration, being a place I want to visit with my family, having transport options that make it easy for me to get to from where I live, and value for money are dimensions that could be prioritized. Efforts to improve a perceived weakness of being a culture that I would want to experience may also help drive destination consideration.



Destination Attributes: Drivers Analysis: Among HVG Audience



The most influential aspects of consideration among HVGs are trending as a must-visit spot and a place I want to visit with my family/friends.



Description

Key drivers analysis (KDA) seeks to identify the strongest predictors of a dependent variable. In this case, we used consideration of a destination (C2) as the dependent variable. The analysis uses a mix of linear and logistic regressions, assessing the simultaneous effect of many independent variables, destination attributes (C6) while controlling for each other.

Interpretation

Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a score of 5% is twice as impactful on consideration as an attribute with a score of 2.5%.



Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience



Among HVGs, Canada stands out as being a safe place to visit, environmentally friendly, offers activities that are physically challenging, has beautiful outdoor scenery and landscapes, and is a great place to see wildlife in its natural habitat. There are white space opportunities on top driver being a place I want to visit with my family.

		Canada	Australia	France	Germany	Iceland	Italy	Portugal	Spain	Switzerland	United Kingdom	United States
	n=	439	142	130	131	121	140	137	133	130	134	119
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life					Strength						
	Is a place to form lifelong memories					Strength						
	Is a place I would be proud to tell people I have visited											
General Needs	Is a place I feel safe visiting (e.g. low crime, safe to walk around, safe for solo travel etc.)	Strength					Weakness			Strength		Weakness
	Is a place where I can explore several different cities or regions in one trip	Weakness	Weakness			Weakness			Strength			
	Offers good value for money			Weakness				Strength		Weakness		
	Has transport options that make it easy for me to get to from where I live				Strength	Weakness						
Type of Trip	Is a place I want to visit with friends								Strength			
	Is a place I want to visit with my family				Weakness							
	Is a great place for holidays that avoid surprises									Strength		
	Is a place where I can experience things that I can't experience at home					Strength						
	Is an environmentally-friendly travel destination	Strength	Strength	Weakness		Strength	Weakness		Weakness	Strength	Weakness	Weakness
To-Do	Is a socially responsible travel destination			Weakness	Strength				Weakness	Strength		Weakness
	Is a place trending as a must-visit spot	Weakness				Weakness	Strength	Weakness				
	Offers activities that are physically challenging	Strength	Strength			Strength	Weakness		Weakness		Weakness	
	Is a great place for shopping and browsing through stores	Weakness	Weakness	Strength		Weakness	Strength	Weakness		Weakness	Strength	Strength
	Its cities have a lot of great attractions to see and do	Weakness		Strength		Weakness		Strength				
	Has great outdoor activities I would participate in			Weakness		Strength		Weakness				
	Has great dining and food experiences	Weakness	Weakness	Strength		Weakness	Strength		Strength	Weakness		
	Has a great arts and music scene	Weakness	Weakness	Strength		Weakness	Strength				Strength	
To-See	Has appealing festivals and events	Weakness	Weakness		Strength	Weakness		Strength	Weakness	Strength	Strength	Strength
	Its cities have a great atmosphere	Weakness	Weakness						Strength			
	Has beautiful outdoor scenery and landscapes	Strength				Strength			Weakness	Strength	Weakness	
	Is a great place to see wildlife in its natural habitat	Strength	Strength	Weakness		Strength	Weakness	Weakness	Weakness			
	Has great historical or heritage sites and experiences	Weakness	Weakness	Strength	Strength	Weakness	Strength		Strength	Weakness	Weakness	Weakness
	Has a culture that I would want to experience	Weakness	Weakness				Strength					

Strength Weakness

Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
 Select "None of these" if you think none of the destinations apply.



Brand Value Statements: Among HVG Audience



Among HVGs, Canada is considered as a place with wide-open landscapes, allows one to enjoy nature close to cities, and is a good place to live. However, each of these sentiments are shared with Australia.

	Canada	Australia	France	Germany	Iceland	Italy	Portugal	Spain	Switzerland	United Kingdom	United States
n=	439	142	130	131	121	140	137	133	130	134	119
Is a place with wide-open landscapes	Strength	Strength	Weakness		Strength	Weakness	Weakness	Weakness		Weakness	Strength
Is a place where nature can be enjoyed in close proximity to cities	Strength	Strength	Weakness								
Is a place that embraces cultural diversity			Strength		Weakness				Weakness		Strength
Is a place where the people are welcoming			Weakness								
Is a place where the people are open-minded					Weakness				Weakness		Strength
Is a place where the people embrace new ideas									Weakness		
Is a good place to live	Strength	Strength						Weakness	Strength		
Has a distinctive identity that can't be replicated by other destinations	Weakness				Strength		Strength				Weakness

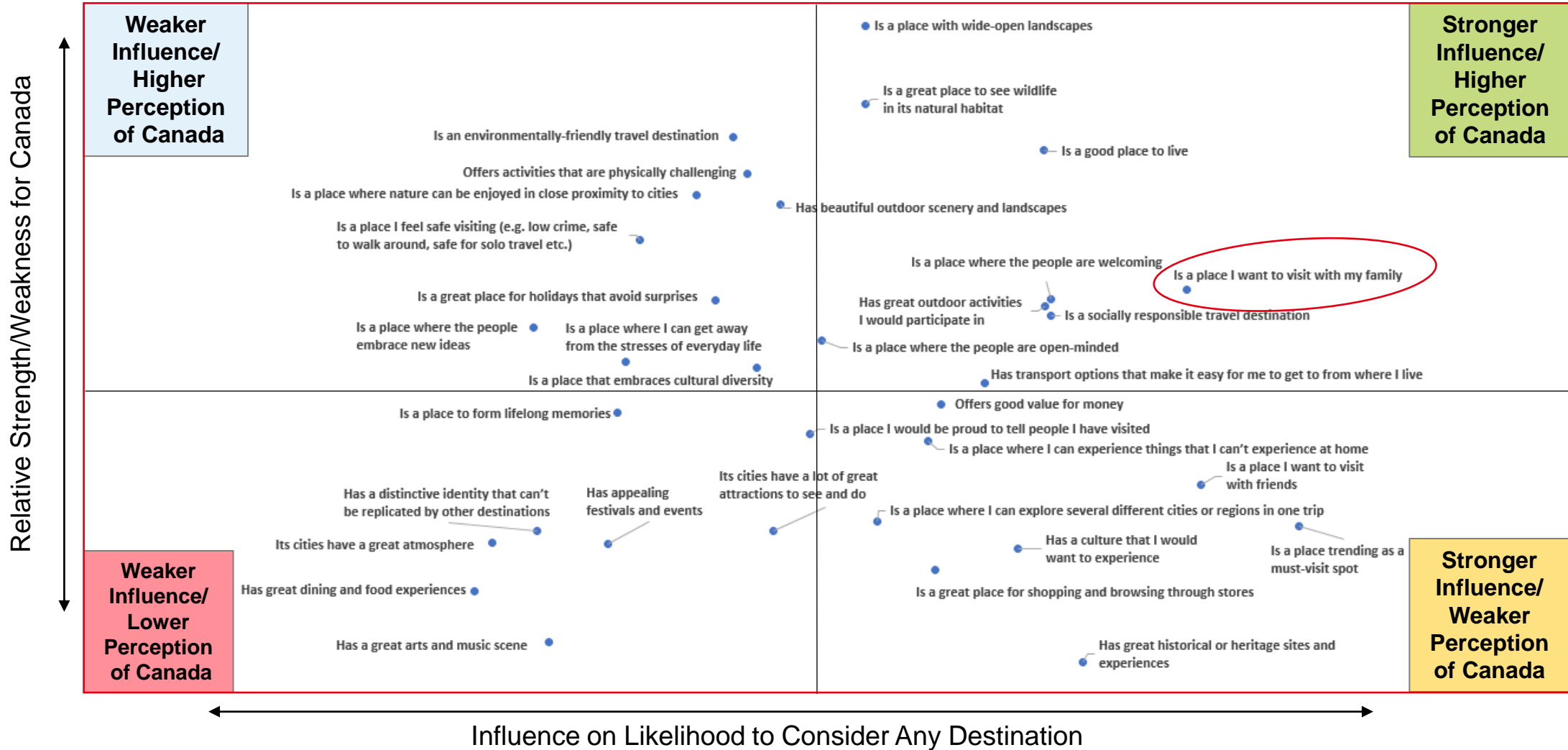
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement.
 Select "None of these" if you think none of the destinations apply.



Canada Strengths & Opportunities: Among HVG Audience



Being a place to visit with family presents the greatest opportunities among HVGs.





Increasing Fall/Winter Visitation

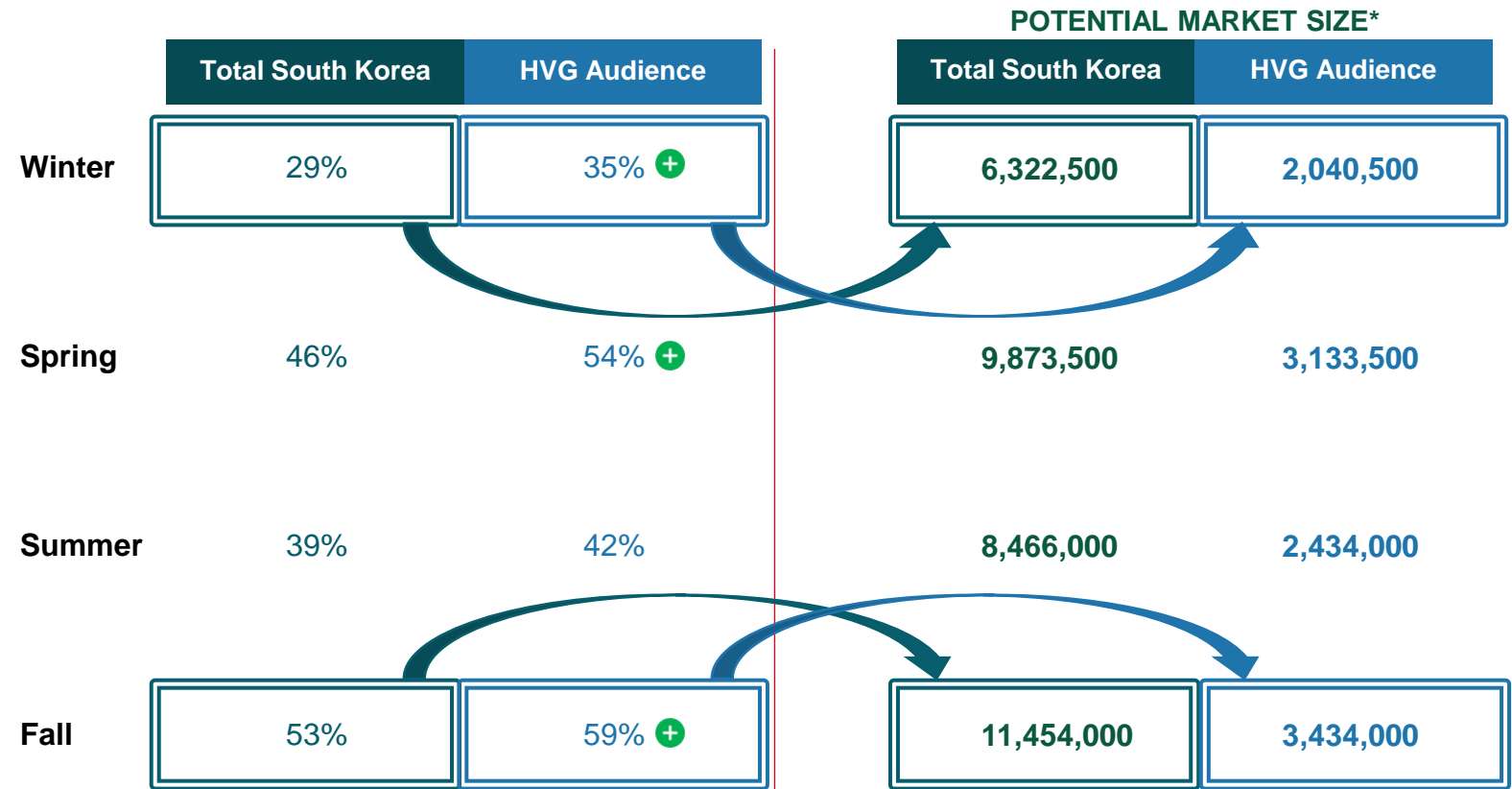
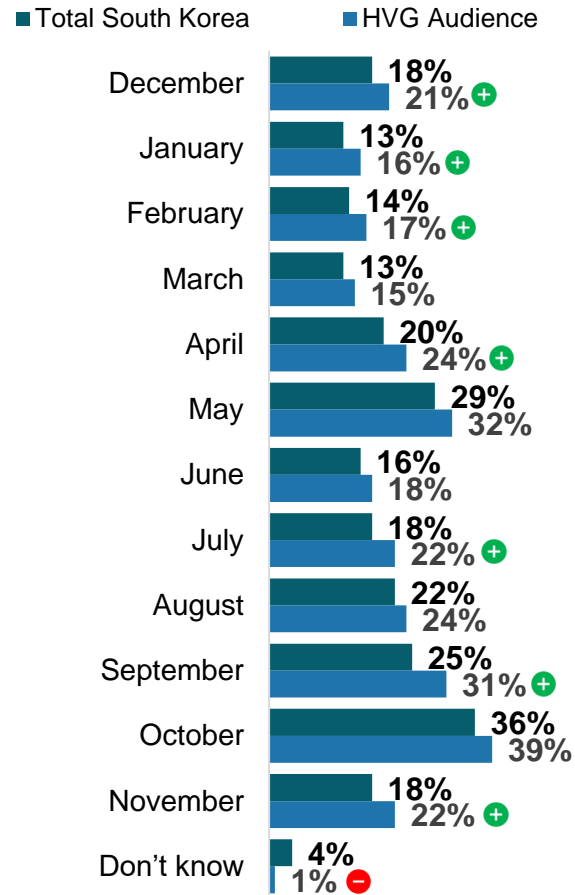


Aurora Borealis, Yellowknife
Northwest Territories



Demand by Season (Any Destination)

Travel demand is highest in the Fall months (~11.5M) for both total South Korean travellers and HVGs. Approximately 6.3M South Koreans travel during the Winter months.



* Calculation: Total potential long-haul pleasure travellers aged 18 years or more (21,652,500) x total in South Korea typically travel during season

* Calculation: Total potential HVG travellers (5,781,000) x total HVG typically travel during season



Top of Mind Fall/Winter Destinations

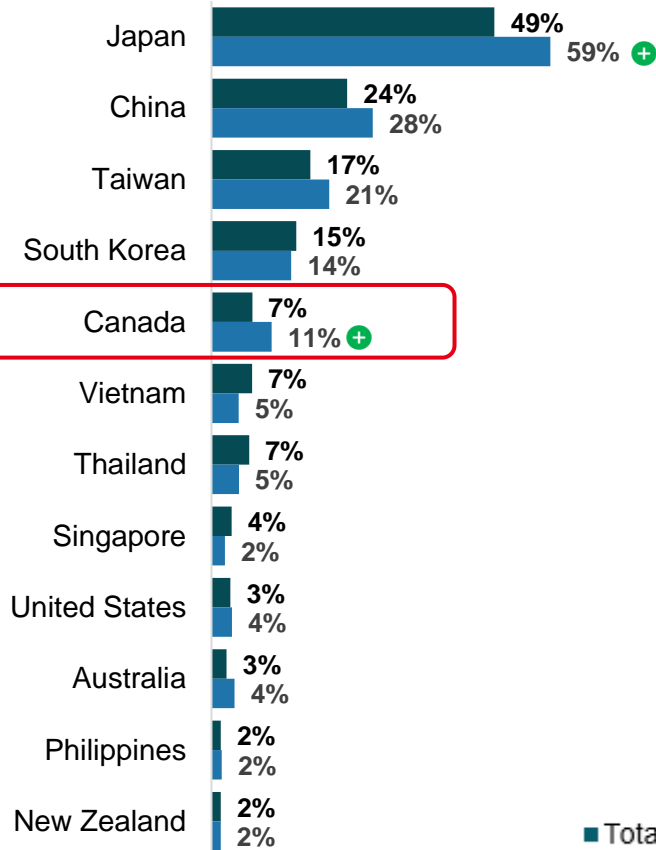


Canada ranks 5th for share of mind for Fall trips and 7th for Winter trips. Japan is the leading destination associated with both seasons. That said, Canada ranks the highest as a Fall and Winter destination outside of Asia.

Autumn Season Description

Autumn is the season between summer and winter. Autumn tends to be a slower season after the busy summer in most destinations. In some destinations, the weather becomes cooler and the leaves on trees shift to red, orange and yellow in preparation to shed. While autumn has some distinct activities and experiences, many summer activities can still be done in autumn.

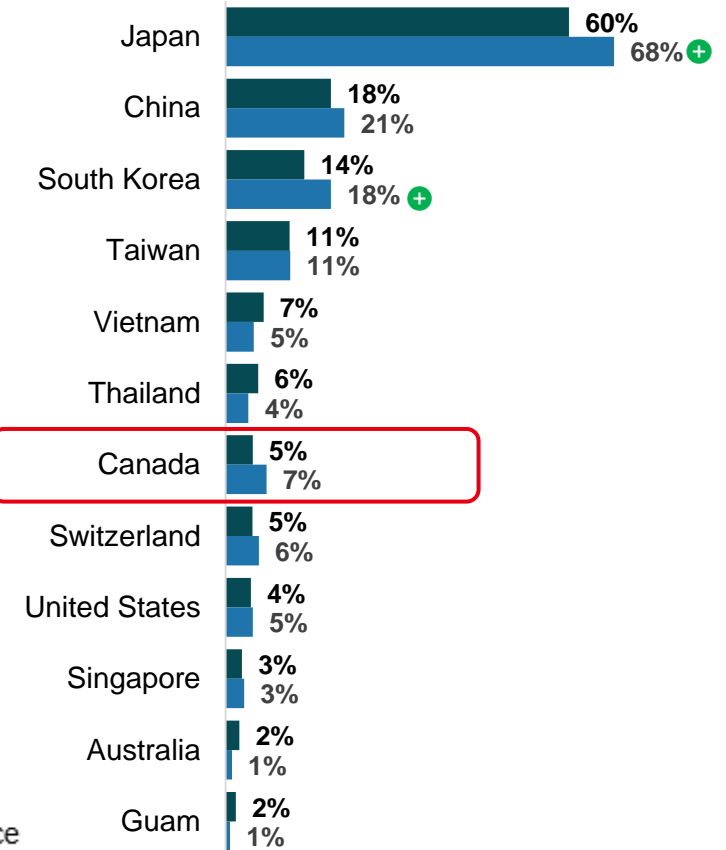
Fall



Winter Season Description

Winter is a season that is typically characterized by colder temperatures. During the winter months there are usually festivals, snow sports and holiday activities. It may snow in some destinations, allowing for skiing, snowboarding, outdoor spas and other winter activities.

Winter



Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)

Base: Long-haul pleasure travellers (past 3 years or next 2 years)

B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip. (n=837); HVG (n=225)

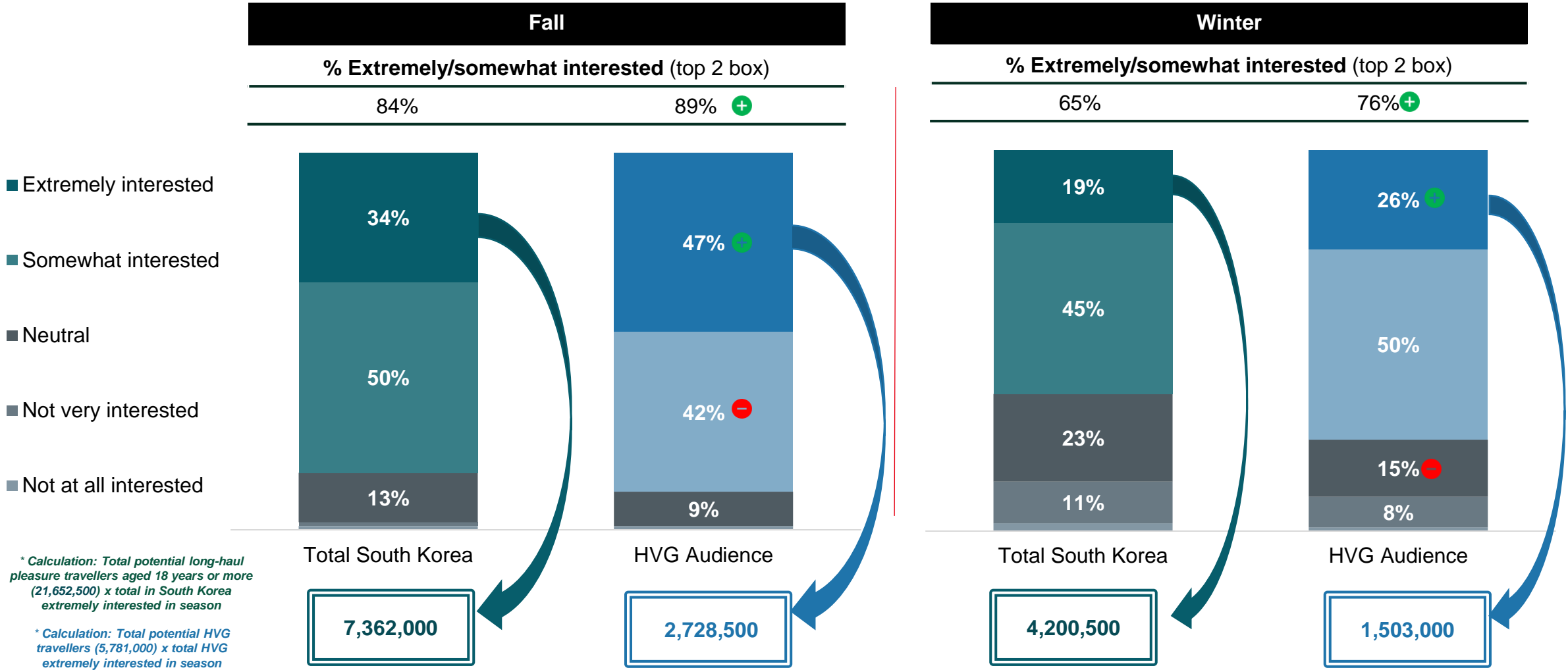
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan.) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip. (n=766); HVG(n=214)



Interest in Fall/Winter Holidays



Interest is far greater for Fall holidays, with 7.4 million South Koreans being extremely interested in taking a trip during a destination's Fall season. While 4.2 million are extremely interested in taking a trip during a destination's Winter season. Interest in both Fall and Winter holidays is higher among HVGs.



37 Note: respondents were asked either about winter travel (B2/D2) or fall travel (B3/D3)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years)
 D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season? (n=837); HVG (n=225)
 D2. In general, how interested are you in taking a holiday trip to a destination during its winter season? (n=766); HVG (n=214)

Potential Market Size For Canada in Fall/Winter



The Canadian market potential is 1.6 times greater in Fall than Winter.

Total potential travellers aged 18 years or more

Target Market for Canada

Size of the target market

Consideration for Canada in [SEASON] in N2Y

Immediate potential for Canada in N2Y

Long haul pleasure travellers

Those in the dream to purchase stages of the path to purchase for Canada

21,652,500

X

79.9%

=

17,300,500

X

Fall: 36.8%

=

Fall: 6,366,500



Winter: 22.6%

Winter: 3,910,000



HVG travellers

5,781,000

X

86.0%

=

4,971,500

X

Fall: 41.5%

=

Fall: 2,063,000



Winter: 26.8%

Winter: 1,332,500



Fall/Winter Conversion – Total South Korea



There is similar conversion between those who typically travel during the Fall and Winter months and interest in taking a trip during a destination's Fall and Winter season. Canada has strong potential to convert those who are extremely interested in travel during the Fall and Winter seasons.



Fall

Demand During Fall Months
(any destination)

11,454,000

64%

Extremely Interested in
Visiting a Destination
During its Fall Season
(any destination)

7,362,000

86%

Next 2 Year Immediate
Potential for CANADA
During Fall Season

6,366,500



Winter

Demand During Winter Months
(any destination)

6,322,500

66%

Extremely Interested in
Visiting a Destination
During its Winter Season
(any destination)

4,200,500

93%

Next 2 Year Immediate
Potential for CANADA
During Winter Season

3,910,000

Base: Long-haul pleasure travellers (past 3 years or next 2 years)
 D1. In general, what time of year do you typically like to take holiday trips? Select all that apply Total (n=1603)
 D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season? Total (n=837)
 D2. In general, how interested are you in taking a holiday trip to a destination during its winter season? Total (n=766)
 C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? Total (n=1279)



Fall/Winter Conversion – Among HVG Audience



Similarly, Canada has strong potential to convert HVGs who are extremely interested in travel during the Fall and Winter seasons.



Fall

Demand During Fall Months
(any destination)

3,434,000

79%

Extremely Interested in
Visiting a Destination
During its Fall Season
(any destination)

2,728,500

76%

Next 2 Year Immediate
Potential for CANADA
During Fall Season

2,063,000



Winter

Demand During Winter Months
(any destination)

2,040,500

74%

Extremely Interested in
Visiting a Destination
During its Winter Season
(any destination)

1,503,000

89%

Next 2 Year Immediate
Potential for CANADA
During Winter Season

1,332,500

Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience
 D1. In general, what time of year do you typically like to take holiday trips? Select all that apply HVG (n=439)
 D3. In general, how interested are you in taking a holiday trip to a destination during its autumn season? HVG (n=225)
 D2. In general, how interested are you in taking a holiday trip to a destination during its winter season? HVG (n=214)
 C7. For each of the following destinations, during which months would you consider taking a holiday trip in the next 2 years? HVG (n=377)



Time of Year Interested in Visiting Canada (Next 2 Years)



The main provinces that South Korean travellers are interested in visiting are British Columbia, Ontario and Quebec, regardless of season.

Total South Korea
HVG Audience

Northwest Territories

3%	4%	Winter (Dec, Jan, Feb)
4%	4%	Spring (Mar, Apr, May)
3%	6%+	Summer (Jun, Jul, Aug)
5%	7%	Fall (Sept, Oct, Nov)

Nunavut

1%	2%+	Winter (Dec, Jan, Feb)
1%	2%	Spring (Mar, Apr, May)
1%	2%+	Summer (Jun, Jul, Aug)
1%	2%	Fall (Sept, Oct, Nov)

Quebec

10%	12%	Winter (Dec, Jan, Feb)
13%	14%	Spring (Mar, Apr, May)
18%	20%	Summer (Jun, Jul, Aug)
26%	29%	Fall (Sept, Oct, Nov)

Newfoundland & Labrador

2%	2%	Winter (Dec, Jan, Feb)
4%	5%	Spring (Mar, Apr, May)
3%	6%+	Summer (Jun, Jul, Aug)
5%	6%	Fall (Sept, Oct, Nov)

Yukon

1%	2%	Winter (Dec, Jan, Feb)
3%	4%+	Spring (Mar, Apr, May)
3%	5%	Summer (Jun, Jul, Aug)
3%	5%	Fall (Sept, Oct, Nov)

British Columbia

9%	11%	Winter (Dec, Jan, Feb)
13%	16%	Spring (Mar, Apr, May)
13%	20%+	Summer (Jun, Jul, Aug)
21%	26%+	Fall (Sept, Oct, Nov)

Prince Edward Island

1%	1%	Winter (Dec, Jan, Feb)
3%	4%	Spring (Mar, Apr, May)
2%	3%	Summer (Jun, Jul, Aug)
2%	4%	Fall (Sept, Oct, Nov)

Alberta

5%	8%+	Winter (Dec, Jan, Feb)
8%	8%	Spring (Mar, Apr, May)
8%	10%+	Summer (Jun, Jul, Aug)
12%	18%+	Fall (Sept, Oct, Nov)

New Brunswick

1%	2%	Winter (Dec, Jan, Feb)
3%	3%	Spring (Mar, Apr, May)
2%	2%	Summer (Jun, Jul, Aug)
1%	1%	Fall (Sept, Oct, Nov)

Nova Scotia

1%	2%+	Winter (Dec, Jan, Feb)
2%	2%	Spring (Mar, Apr, May)
2%	3%	Summer (Jun, Jul, Aug)
2%	2%	Fall (Sept, Oct, Nov)

Saskatchewan

2%	2%	Winter (Dec, Jan, Feb)
3%	4%	Spring (Mar, Apr, May)
3%	4%	Summer (Jun, Jul, Aug)
2%	4%	Fall (Sept, Oct, Nov)

Manitoba

2%	2%	Winter (Dec, Jan, Feb)
3%	3%	Spring (Mar, Apr, May)
3%	3%	Summer (Jun, Jul, Aug)
3%	4%	Fall (Sept, Oct, Nov)

Ontario

7%	8%	Winter (Dec, Jan, Feb)
16%	20%	Spring (Mar, Apr, May)
18%	24%+	Summer (Jun, Jul, Aug)
23%	29%+	Fall (Sept, Oct, Nov)

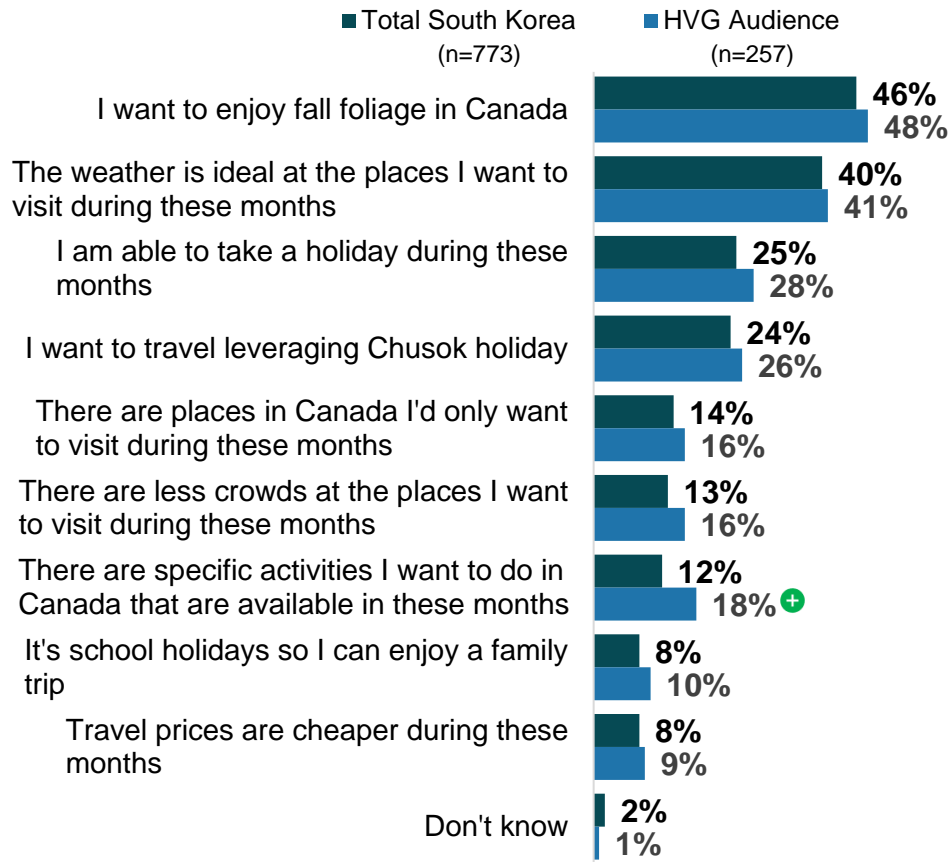


Motivators & Barriers for Fall Travel to Canada



Fall foliage and the weather are main motivators for travelling to Canada during the Fall; while being unable to take a vacation during these months is the main deterrent. Of note, one in four specifically say they want to travel to leverage the Chusok holiday.

Motivators for Fall Travel



Barriers for Fall Travel



Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in September, October or November E6a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would be interested in travelling to Canada for a holiday during these **autumn months**?

Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October and/or November... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **autumn months**?

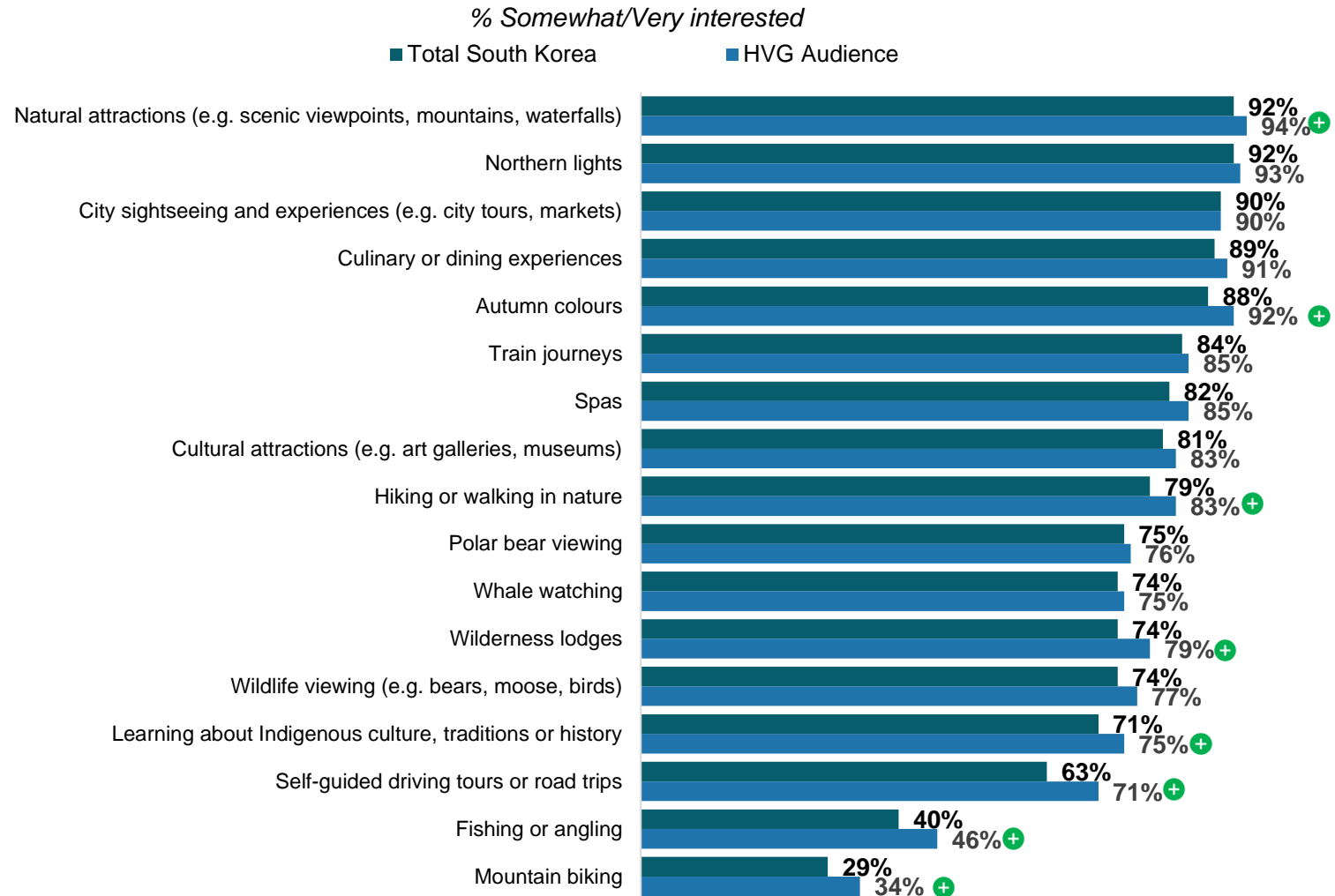
South Korea GTRP – December 2023

+ / - = significantly higher/lower result (vs. Total)



Interest in Fall Activities in Canada

Natural attractions, the Northern lights, and city sightseeing are the top experiences South Korean travellers are interested in during a Fall trip to Canada.

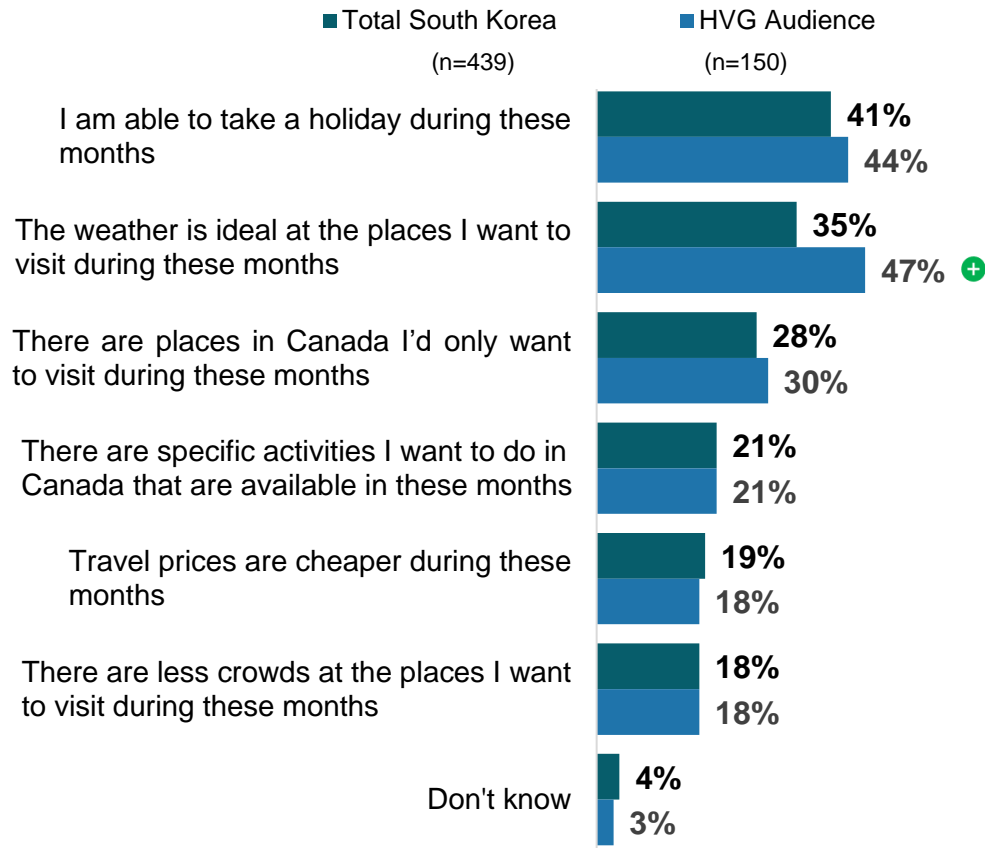


Motivators & Barriers for Winter Travel to Canada



In the Winter, the cold weather is both a motivator and deterrent. Specifically, among HVGs, the weather is the top motivator for travelling during the Winter months.

Motivators for Winter Travel



Barriers for Winter Travel



Base: Those in the dream to purchase stages of the path to purchase for Canada and considering visiting Canada or any province/territory in December, January or February E8a. You indicated earlier that you are considering taking a holiday to **Canada** during the months of December, January and/or February... Which of the following describes why you would be interested in travelling to Canada for a holiday during these **winter months**?

Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or February... Which of the following describes why you would **not** be interested in travelling to Canada for a holiday during these **winter months**?

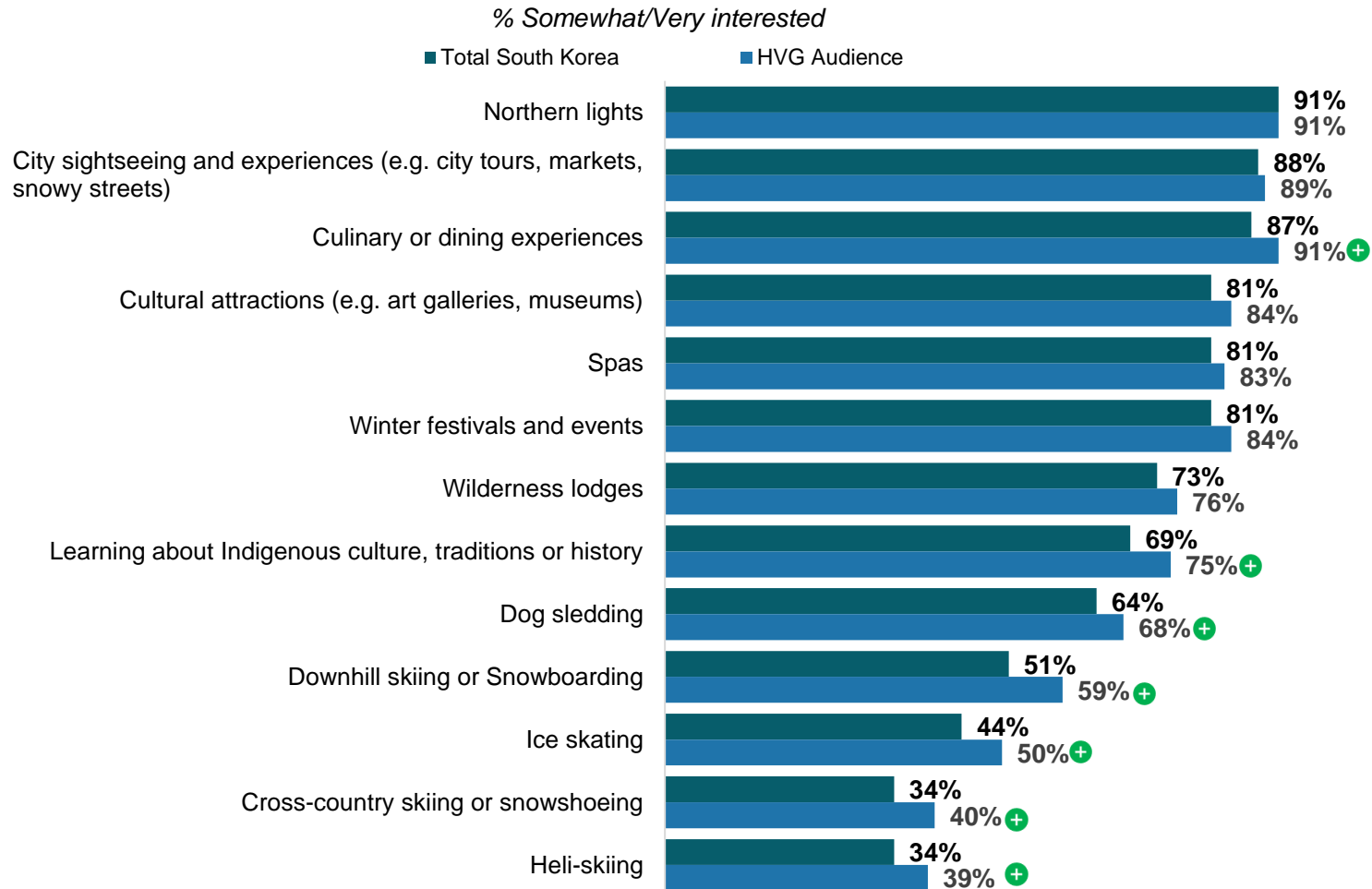
+ / - = significantly higher/lower result (vs. Total)

South Korea GTRP – December 2023



Interest in Winter Activities in Canada

In the Winter, the Northern Lights, city sightseeing, and culinary experiences are of greatest interest for travellers to Canada. HVGs have a higher interest overall in Winter activities compared to total South Korean travellers.





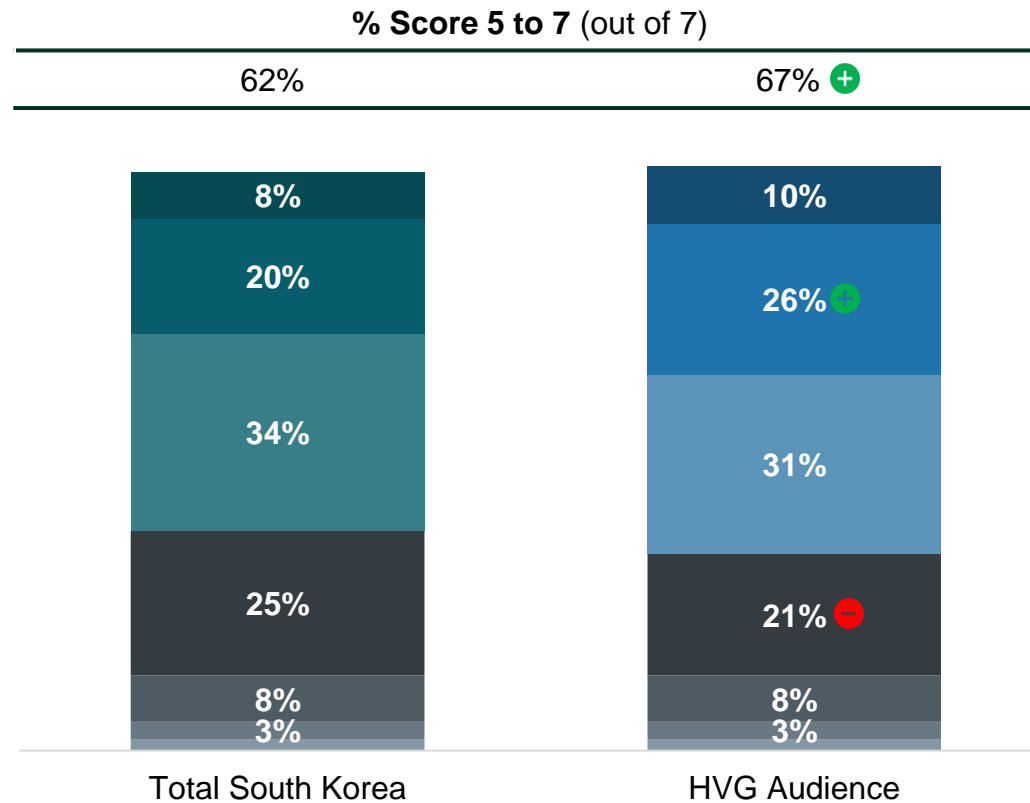
Sustainability



Priority of Sustainable Travel When Planning a Trip



Sustainable travel is a moderate priority for most South Korean travellers. Canada is more likely than the US and Australia to be perceived as a socially responsible travel destination, but scores behind Switzerland.



% Associate [DESTINATION] with...	Is a socially responsible travel destination	
	Total South Korea	HVG
Canada	32%	38% +
United States	23%	20%
Australia	29%	33%
Switzerland	36%	44%

Sustainable Travel Description

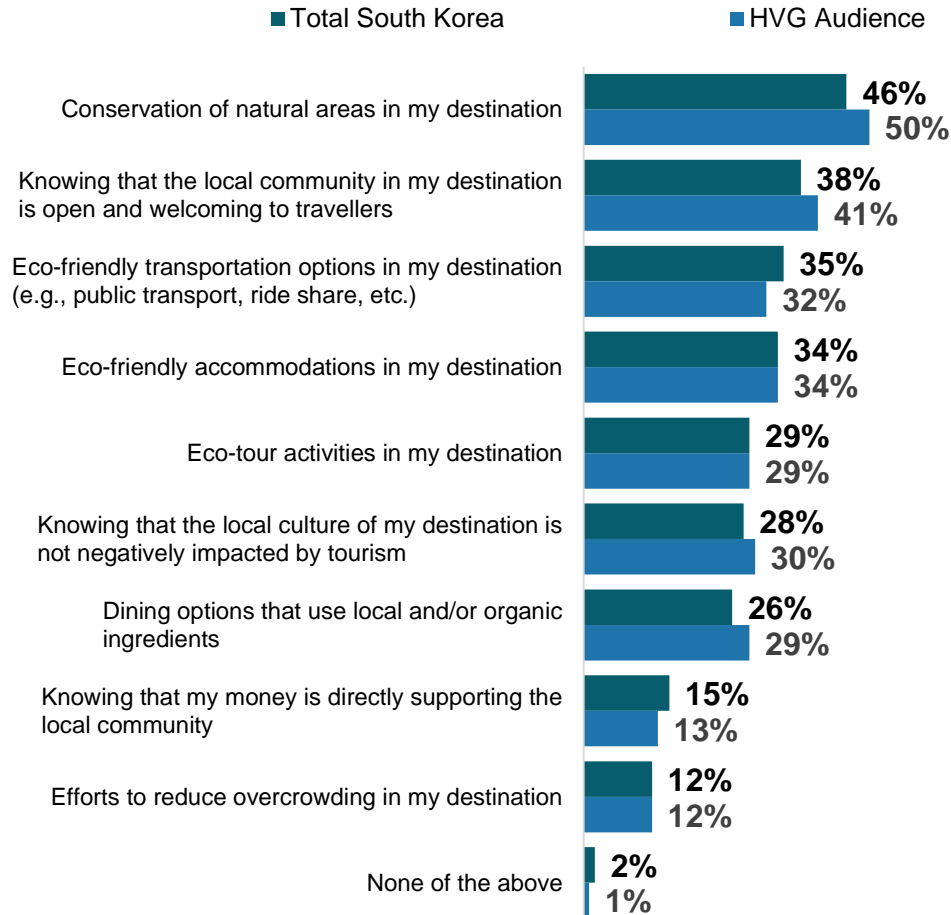
Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603); HVG (n=439)
 D7. [DESCRIPTION] How much of a priority is sustainable travel to you when you are planning a trip? Please use a 7-point scale, where 7 means 'essential priority' and 1 means 'not a priority'.
 C6. We are interested in your general impressions about destinations even if you have never been there. Please select all the destinations you think apply to the statement. Select "None of these" if you think none of the destinations apply.



Top 3 Most Important Sustainability Efforts

The most important sustainability efforts to South Korean travellers are the conservation of natural areas, knowing the destination is open and welcoming to travellers, and having eco-friendly transportation options and accommodations available.

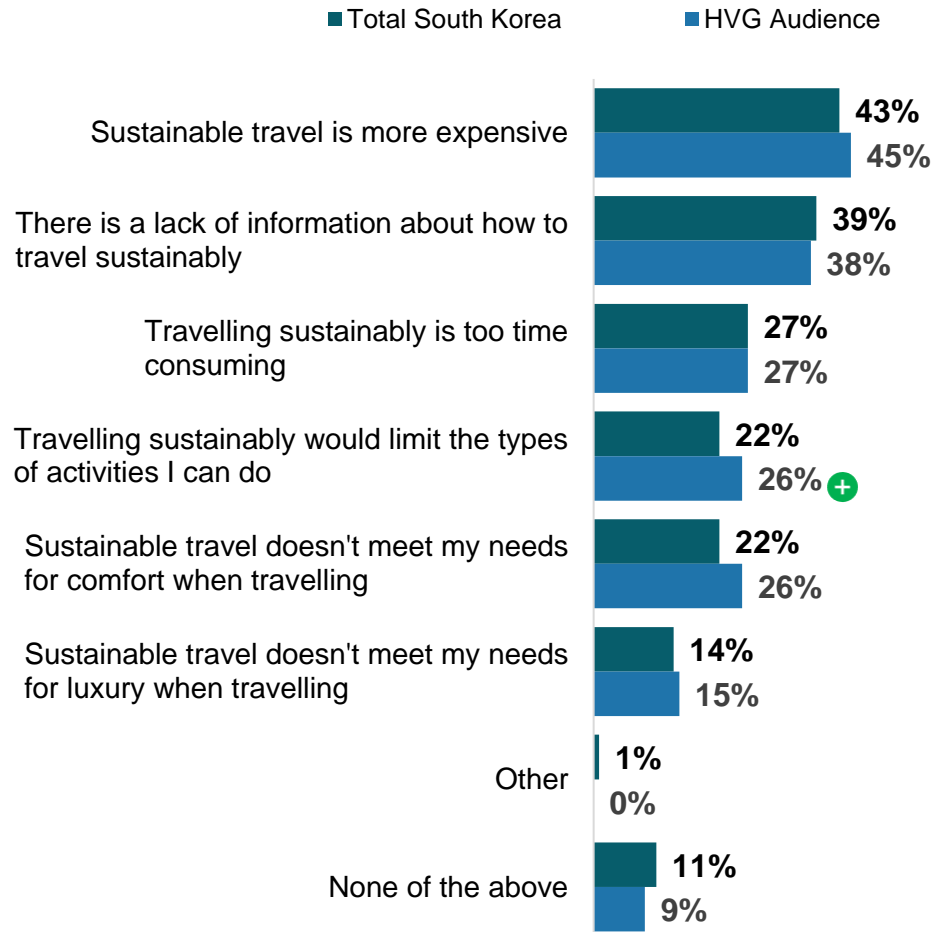


Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.

Barriers to Sustainable Travel

The biggest barriers to sustainable travel are the perception that it is more expensive and a lack of information around it. HVGs are more likely to say travelling sustainably would limit the types of activities they can do.



Sustainable Travel Description

Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”.



Indigenous Tourism



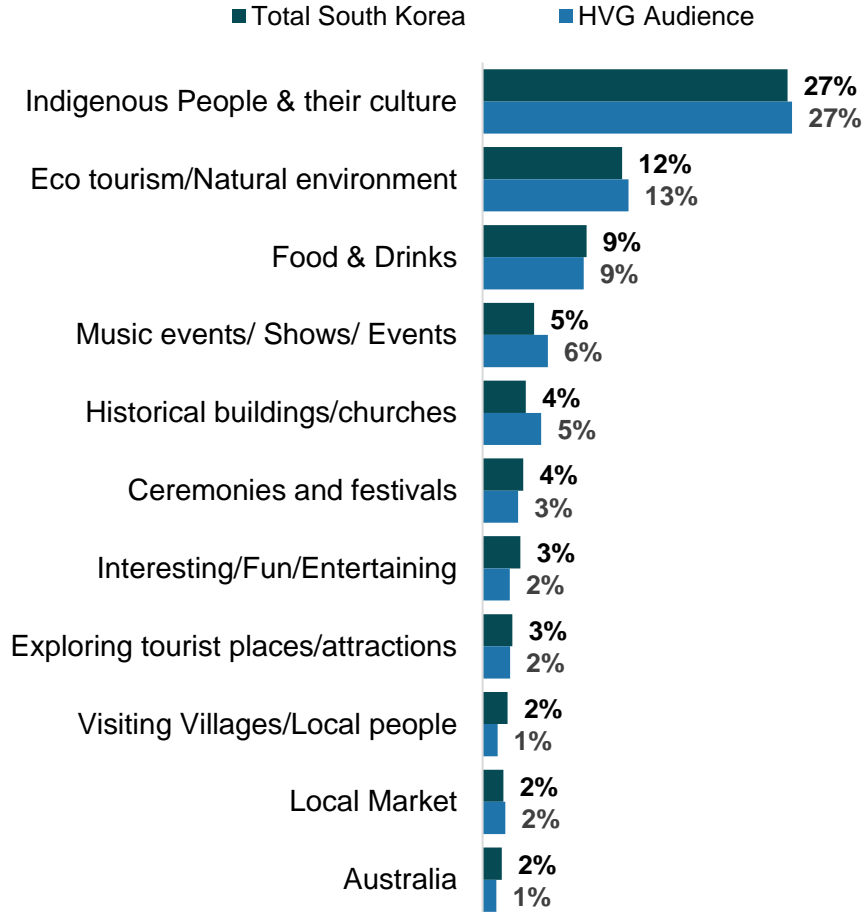
Unaided Mentions – Indigenous Cultural & Tourism Activities

The culture, followed by ecotourism/environment and food/drink are the top activities that come to mind when it comes to Indigenous tourism. However, Canada is not considered a top destination for Indigenous tourism; Japan, China and Taiwan are the most mentioned.

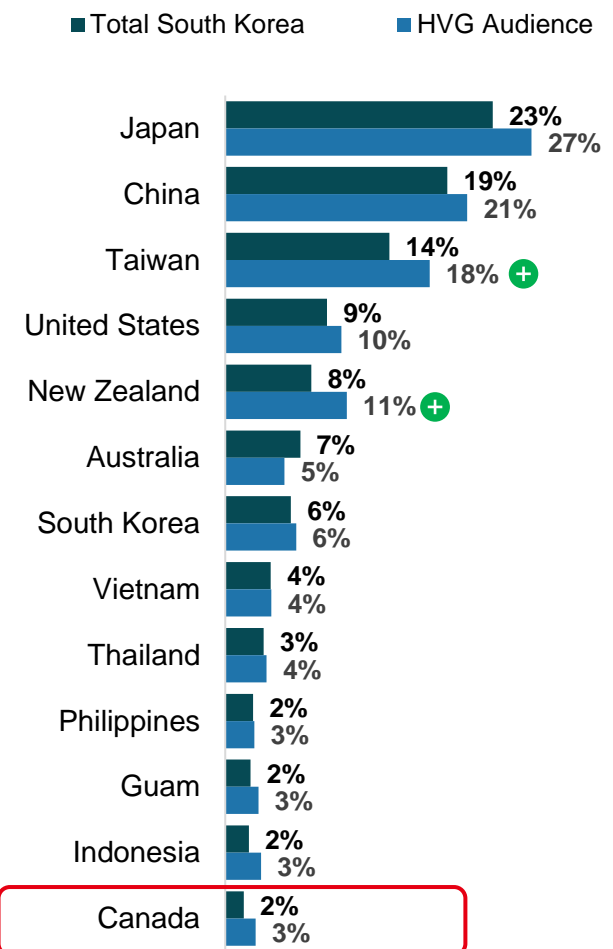
Indigenous Peoples Description

Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people.

Activities



Tourism Destinations



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603); HVG (n=439)

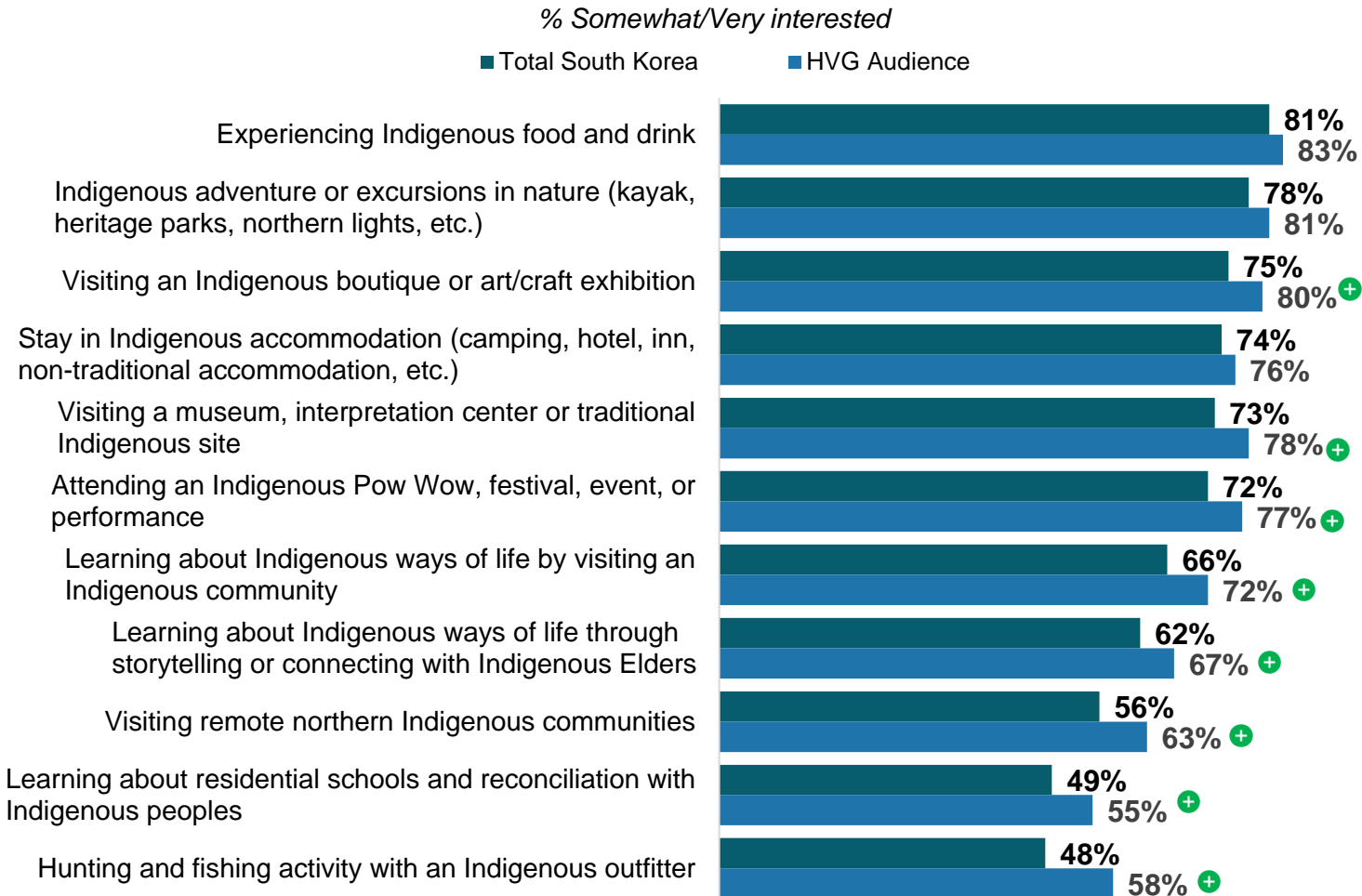
D6. [DESCRIPTION] What comes to mind first when thinking about **Indigenous cultural and tourism activities or experiences?**

B4. [DESCRIPTION] What destinations come to mind when thinking about **Indigenous tourism?** (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan). Please note: You do not have to limit your responses to destinations you are considering for a holiday trip



Interest in Indigenous Cultural & Tourism Activities

There is stronger interest in experiencing the Indigenous culture through food and drink and excursions in nature. HVGs have a higher overall interest in Indigenous activities compared to total South Korean travellers.



Indigenous Tourism Description

As you may or may not know, in Canada, Indigenous tourism businesses are majority-owned or operated by Indigenous peoples (First Nations, Métis or Inuit). The social and economic benefits of Indigenous tourism businesses goes back to the business owners and/or the communities where they are based.

THANK YOU

For any questions, please reach out to research@destinationcanada.com



CANADIAN TOURISM DATA
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