

CONFIDENTIAL

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

TOPLINE REPORT

TOTAL SOUTH KOREA VS. HIGH VALUE GUEST AUDIENCE



CANADIAN TOURISM DATA
collective

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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

- 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.





Market Sizing



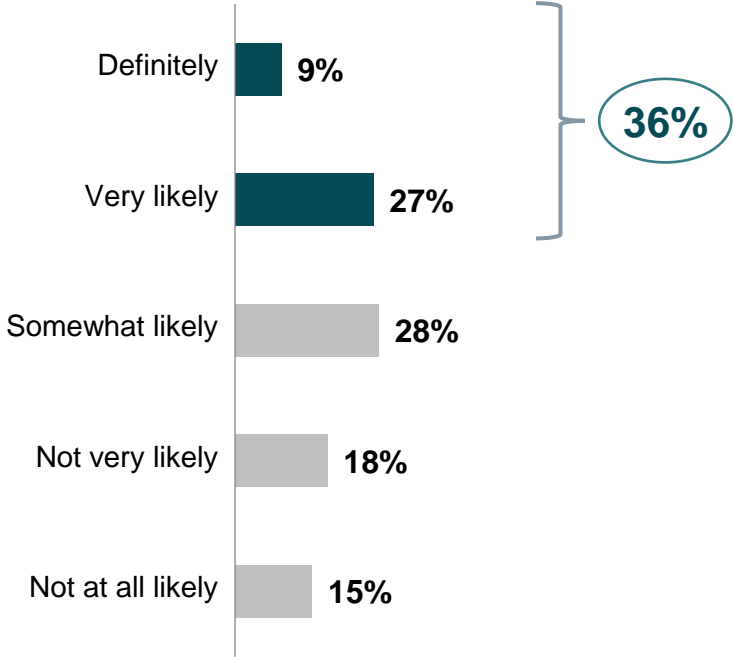
Yellowknife
Northwest Territories



Incidence of Long-Haul Pleasure Travel (General Population)



Plan to Take Long-Haul Pleasure Trip in Next 2 Years



Incidence Rate

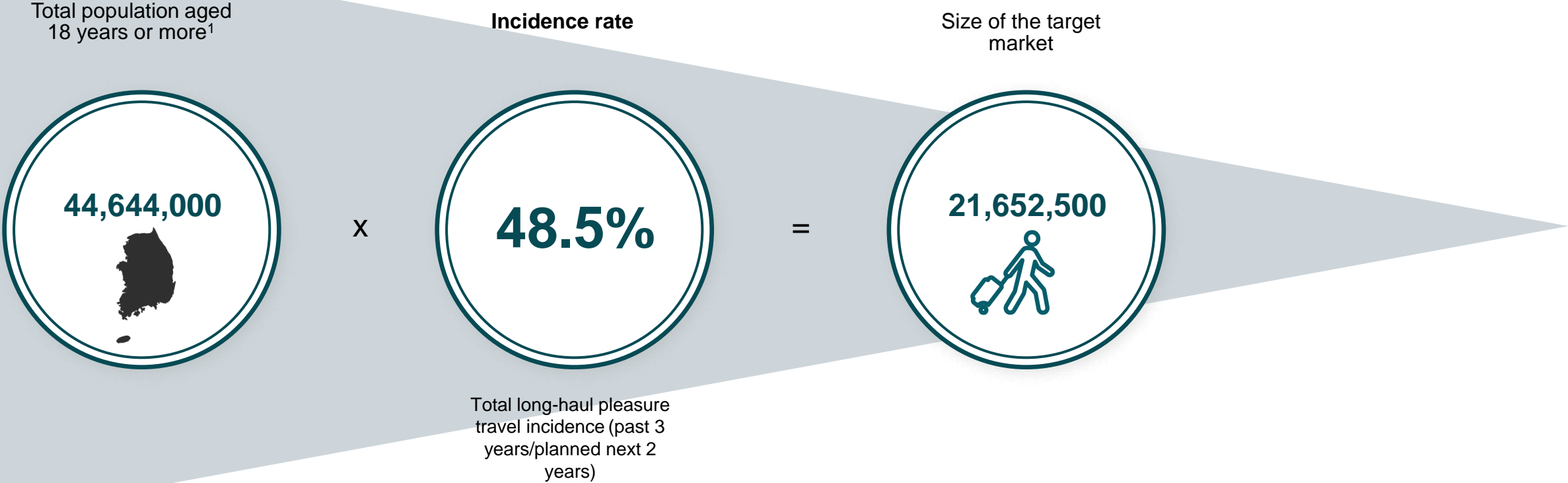


Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)

5 [^] Long-haul = outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)
 Note: Results are from 2023 YouGov Canada Omnibus Survey
 Base: General population aged 18+ (n=987)



Long-Haul Pleasure Traveller Sizing

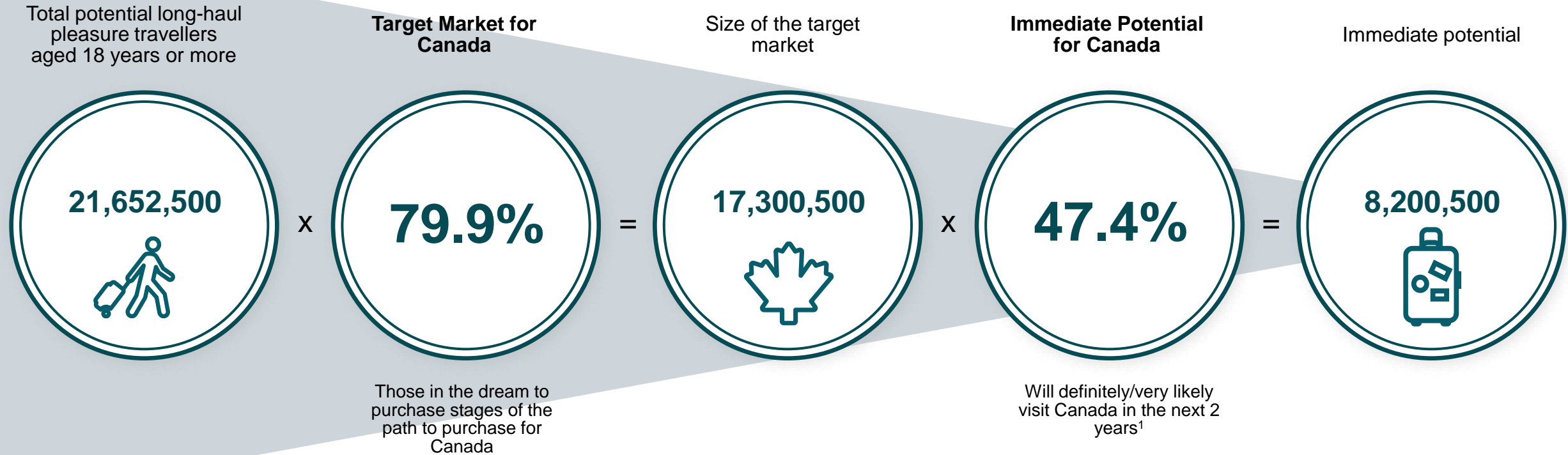


6 ¹Source: Estimates 2023, Statistics Korea
Note: Results are from 2023 YouGov Canada Omnibus Survey
Base: General population aged 18+ (n=987)



Potential Market Size For Canada

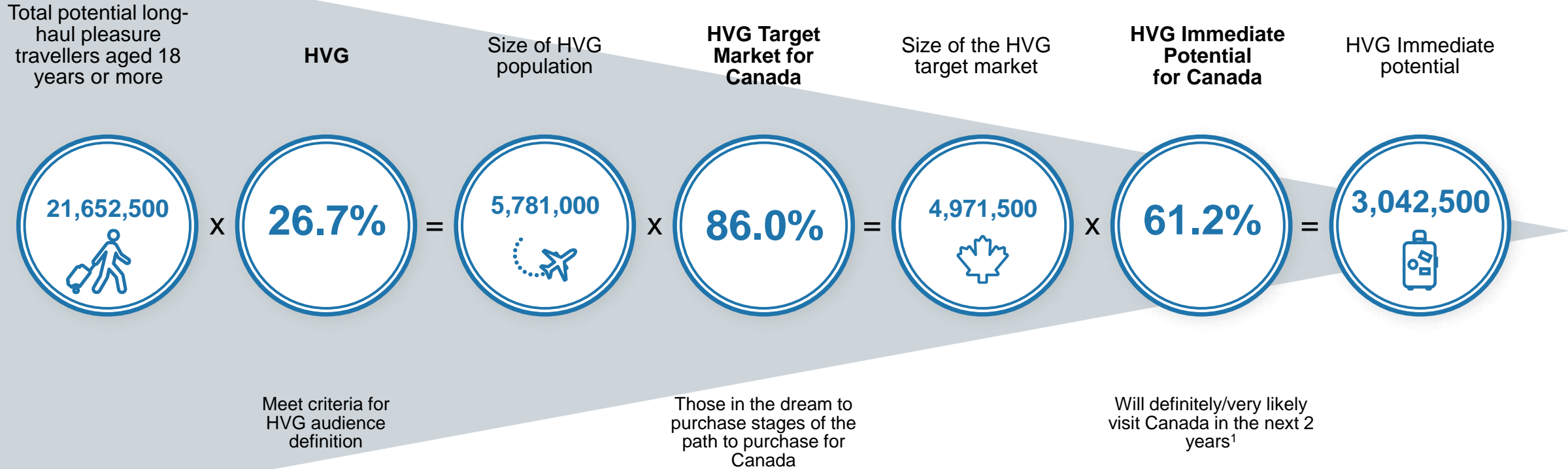
Size of the Potential Market to Canada (Next 2 Years)



¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
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)
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)

Potential Market Size For Canada

Size of the Potential Market to Canada (Next 2 Years): *HVG Audience*



¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
 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)
 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)



Potential Market Size for the Regions

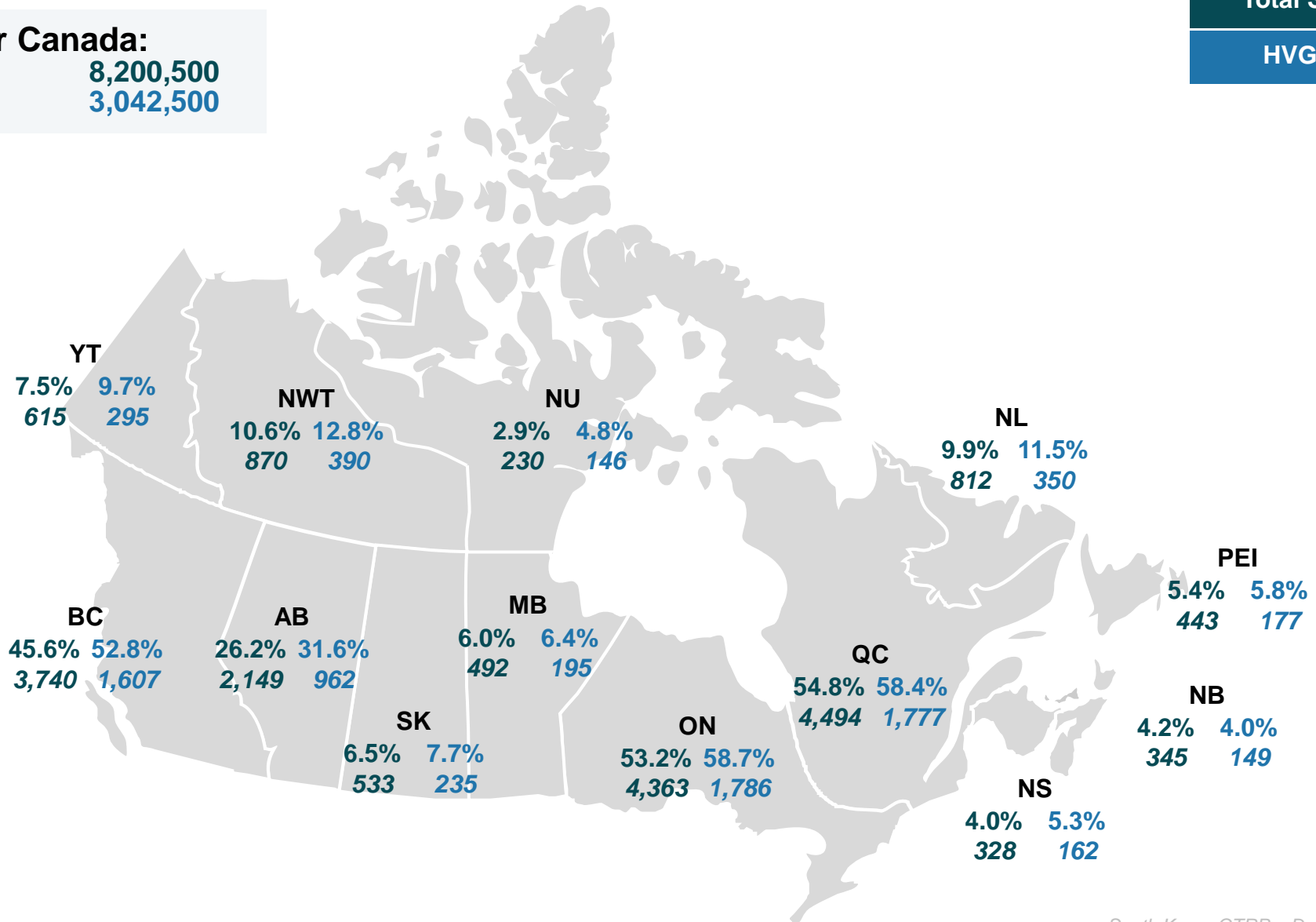


Total South Korea

HVG Audience

Immediate Potential for Canada:
 Total South Korea: 8,200,500
 HVG Audience: 3,042,500

Key:
 % likely to visit region
 Immediate potential (000s)





Key Performance Indicators



Prince Albert National Park
Saskatchewan



Key Performance Indicators

Indicator	Definition	All Long-haul Travellers (n=1603)	HVG Audience (n=439)
Unaided destination consideration	% who mentioned Canada or a destination in Canada on their consideration list ¹	1%	2% ⁺
Aided destination consideration	% who rate Canada 4 or 5 (I am seriously considering) out of 5	43%	52% ⁺
Aided awareness of travel opportunities in Canada	% with excellent/very good knowledge of travel opportunities in Canada	34%	42% ⁺
Past visitation	% who have ever visited Canada for pleasure	24%	36% ⁺

¹ For trips in the next 2 years.

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

B1. You mentioned that you are likely to take a long-haul holiday trip **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

C2. You may have already mentioned this before, but would you consider visiting each of the following destinations in the next 2 years? Please use a 5-point scale where 1 means 'I am definitely not considering' and 5 means 'I am seriously considering'.

C5. How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)

B5. Which of the following countries or regions have you visited while on a holiday trip **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** which was 4 or more nights long?



Key Performance Indicators: Seasonal & Indigenous



Indicator	Definition	All Long-haul Travellers	HVG Audience
Unaided <u>fall</u> destination	% who mentioned Canada or a destination in Canada ¹	7%	11% ⁺
Aided destination consideration for <u>fall</u>	% consider Canada for the months of September, October and/or November ²	37%	42% ⁺
Unaided <u>winter</u> destination	% who mentioned Canada or a destination in Canada ¹	5%	7%
Aided destination consideration for <u>winter</u>	% consider Canada for the months of December, January and/or February ²	23%	27% ⁺
Unaided <u>Indigenous tourism</u> destination	% who mentioned Canada or a destination in Canada	2%	3%

¹Among respondents who answered about winter/fall travel

²Among those in the dream to purchase stages of the path to purchase to Canada

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

B2. What destinations come to mind when thinking about travel to experience the **winter** season? Total (n=766); HVG (n=214)

B3. What destinations come to mind when thinking about travel to experience the **autumn** season? Total (n=837); HVG (n=225)

C7. For each of the following destinations, during which months would you consider taking a vacation trip in the next 2 years? Total (n=1279); HVG (n=377)

B4. What destinations come to mind when thinking about **Indigenous tourism**? Total (n=1603); HVG (n=439)





Market Outlook



St. John's

Newfoundland and Labrador



Market Outlook

Indicator	Definition	All Long-haul Travellers (n=1603)	HVG Audience (n=439)
Incidence of long-haul pleasure travel	% who have taken a long-haul pleasure trip in the past 3 years	86%	100% +
Long-haul travel intentions	% who plan ¹ to take a long-haul pleasure trip in the next 2 years	70%	100% +
Market Outlook (Net change in long-haul travel)	% who will <u>spend a little more</u> on travel outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan) in the next 12 months MINUS % who will <u>spend a little less</u>	-3%	+19%

¹ Who are 'Definitely' or 'Very Likely' to take a long-haul trip in the next 2 years.

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

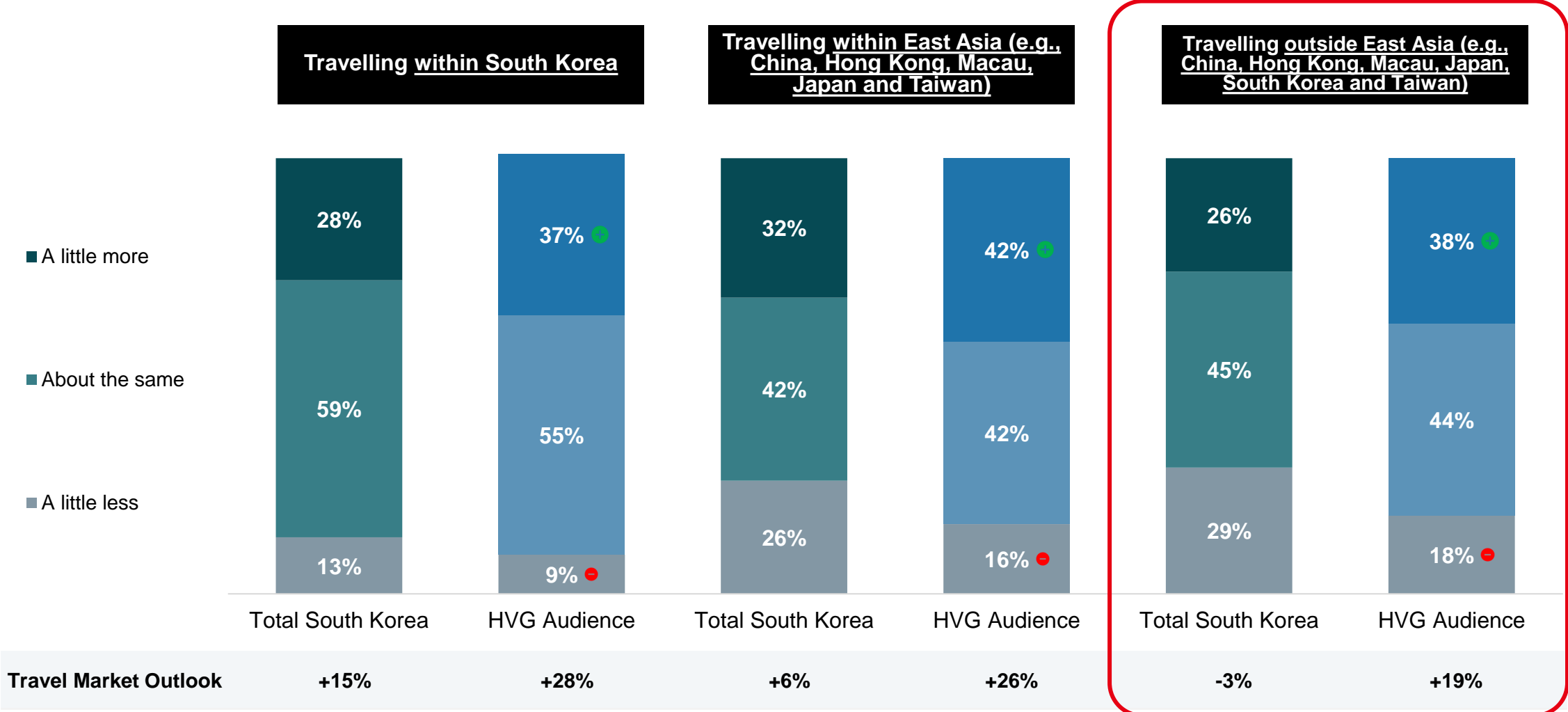
A7. In the past 3 years, have you taken a long-haul holiday trip of 4 or more nights **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** where you spent at least 1 night in paid accommodations? (Select one only)

A9. In the next 2 years, how likely is it that you will take a long-haul holiday trip of 4 or more nights **outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)** where you will spend at least 1 night in paid accommodations? (Select one only)

A5. How would you describe your spending intentions on the following items in the next 12 months compared to the 12 months? Will you spend...



Spending Intentions (in Next 12 Months)

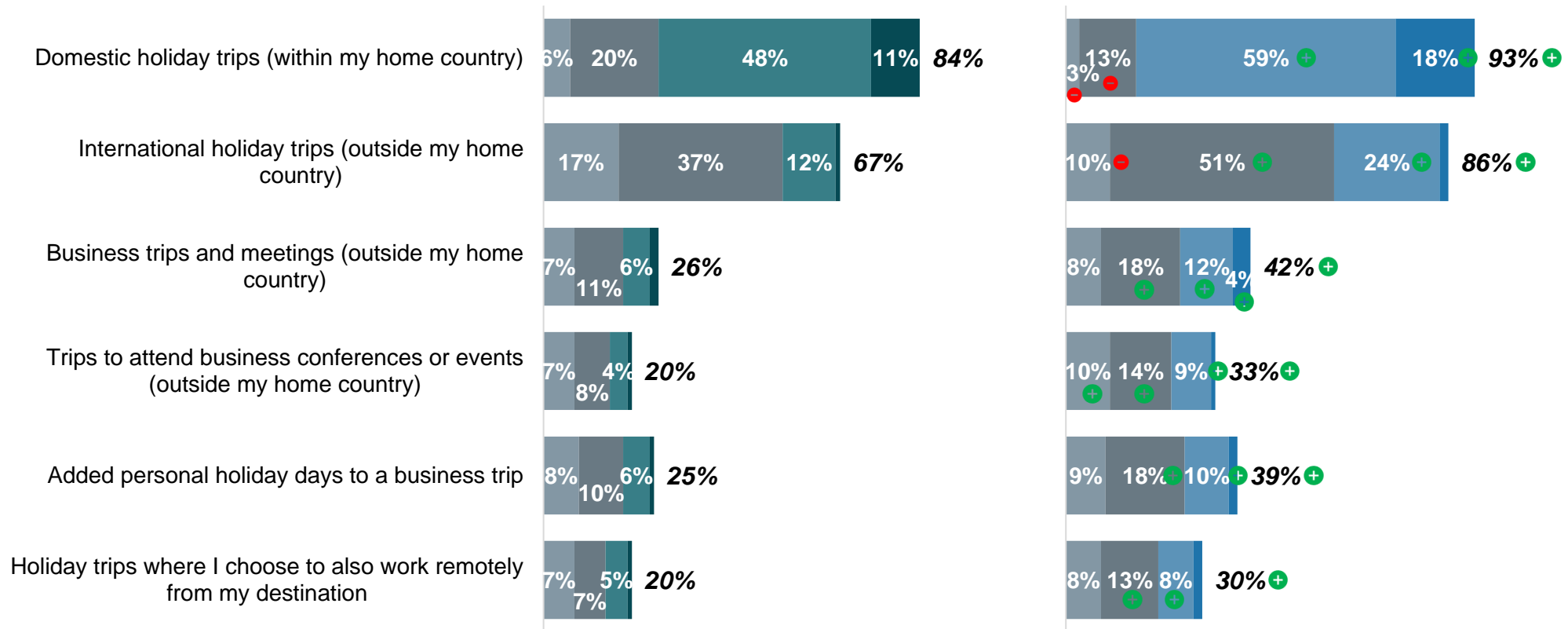


Types of Travel Trips

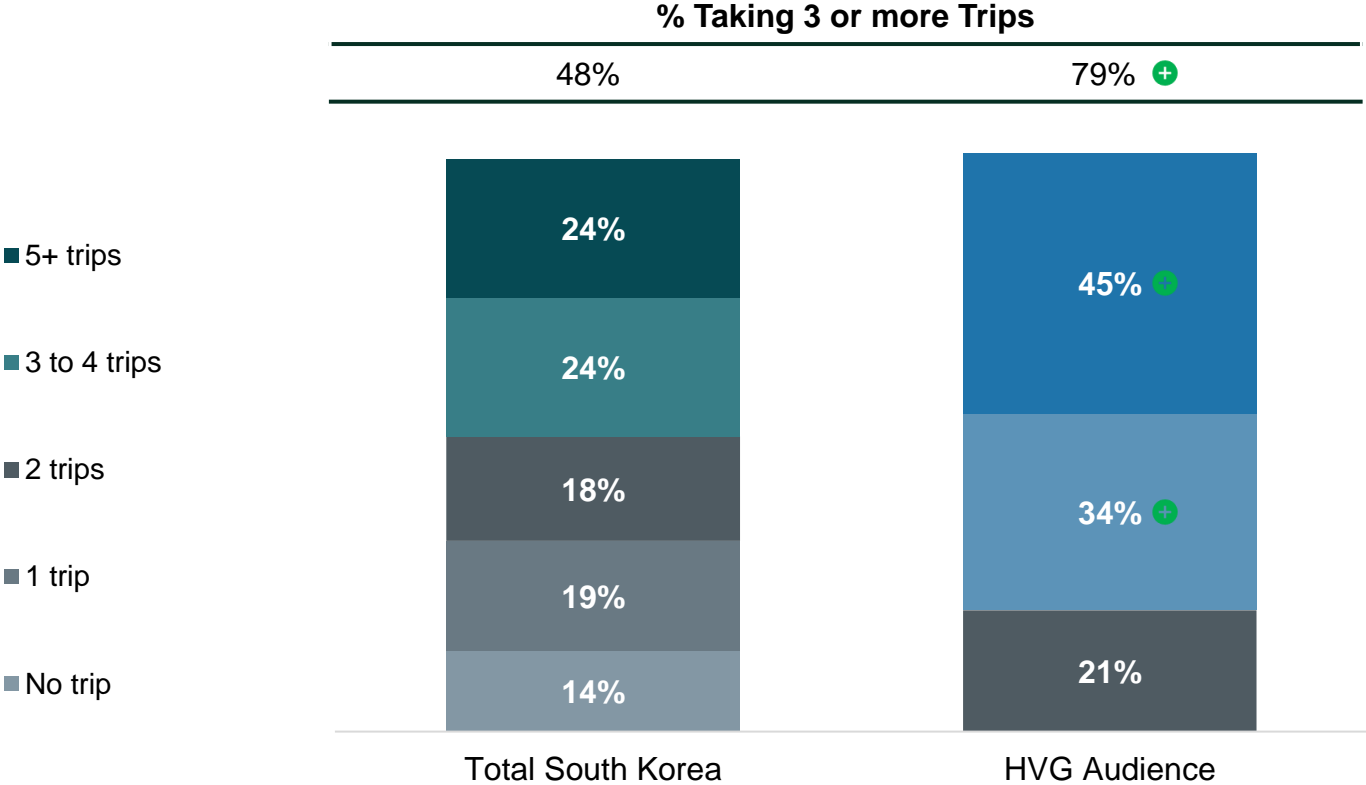
Total South Korea

HVG Audience

■ Sometimes (once every 2 years)
 ■ Regularly (once a year)
 ■ Often (several times a year)
 ■ Very often (about once a month or more)
 ■ At least every 2 years




Long-Haul Travel Intensity





Canada vs. Competitors



 Peggy's Cove
Nova Scotia

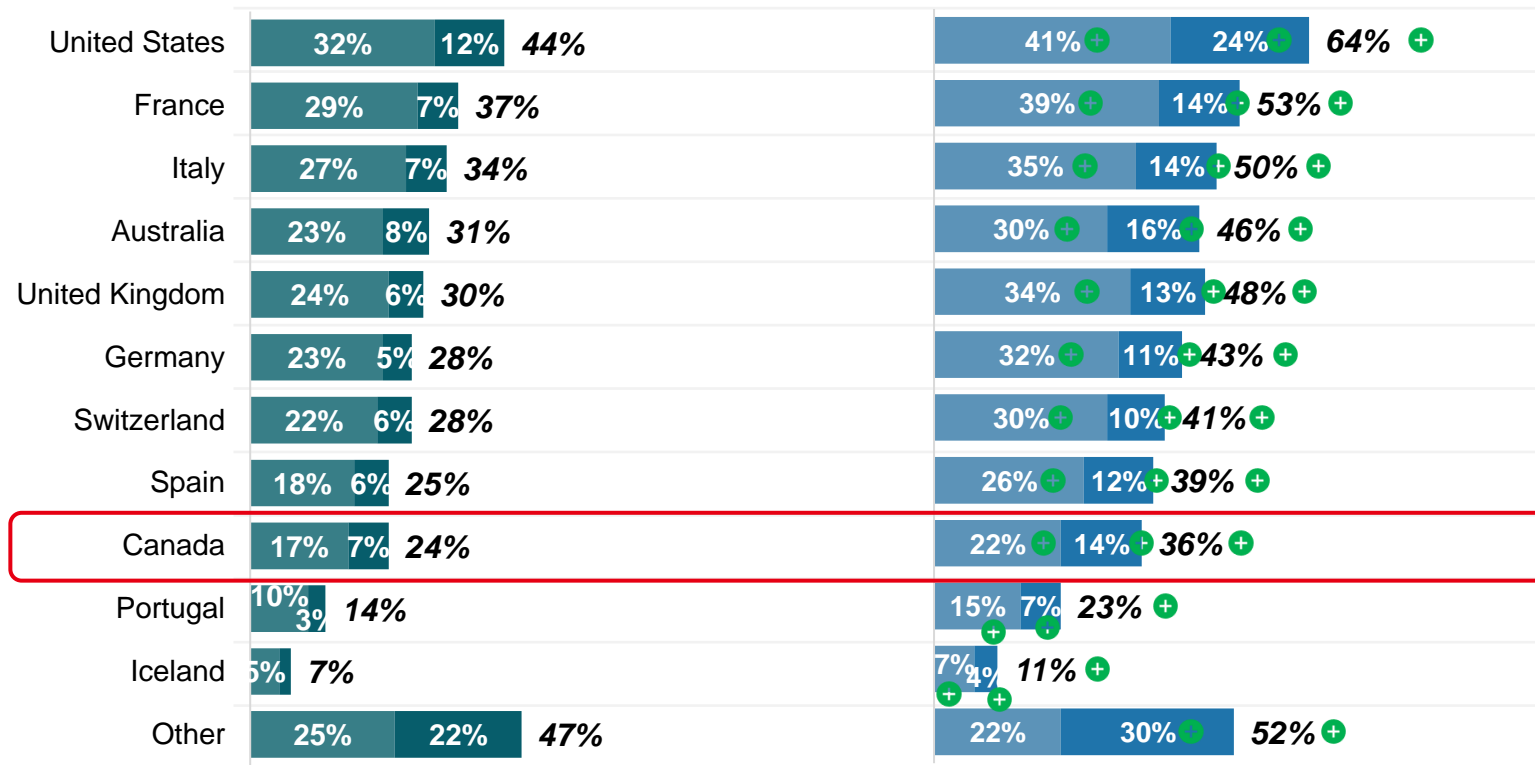


Past Visitation

Total South Korea

HVG Audience

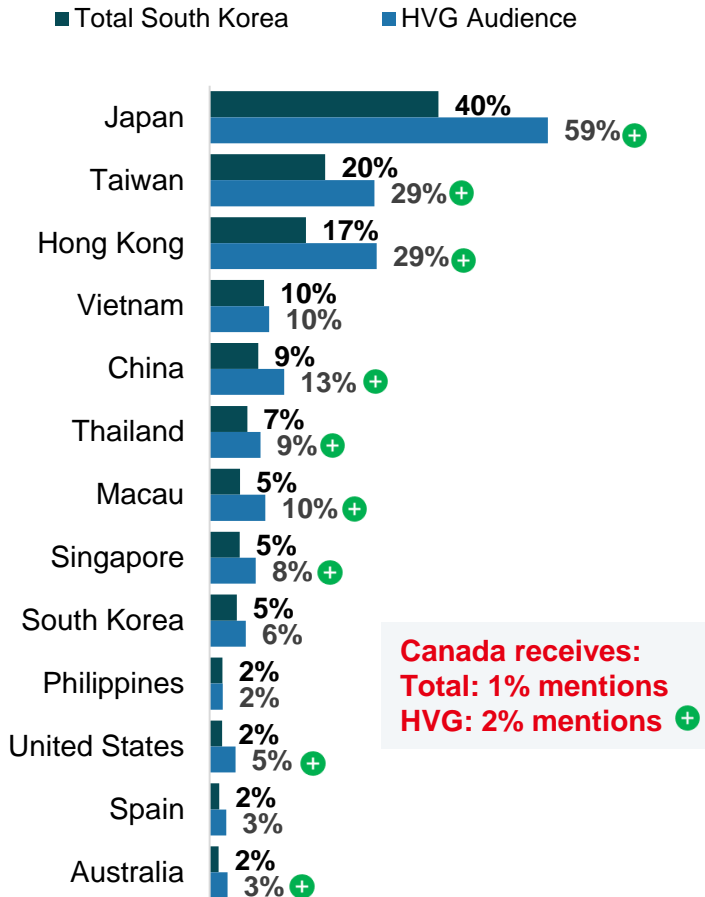
■ Visited more than 3 years ago ■ Visited in the past 3 years ■ Ever visit



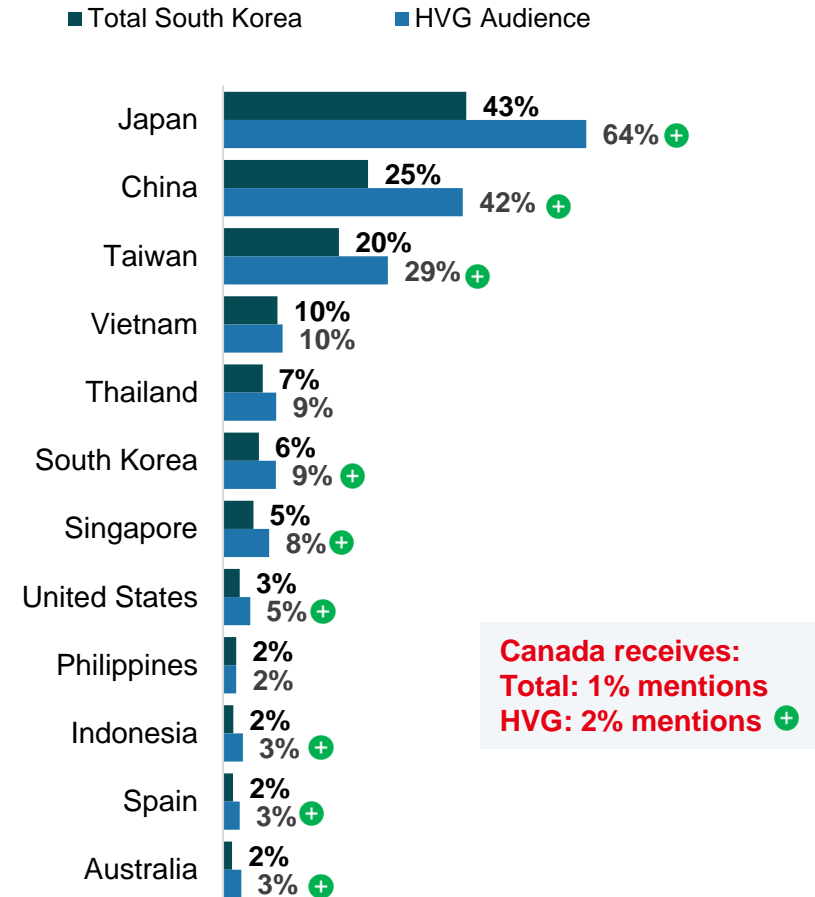
Unaided Long-Haul Destination Consideration (Next 2 Years)



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)

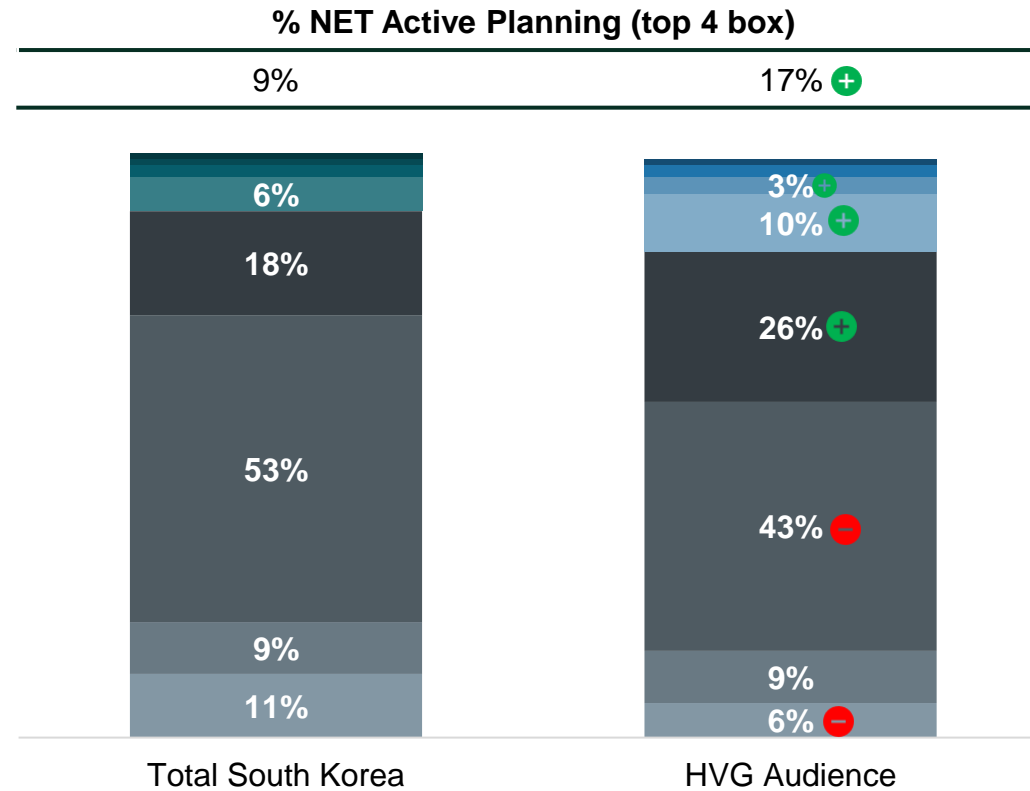
B1. You mentioned that you are likely to take a long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)



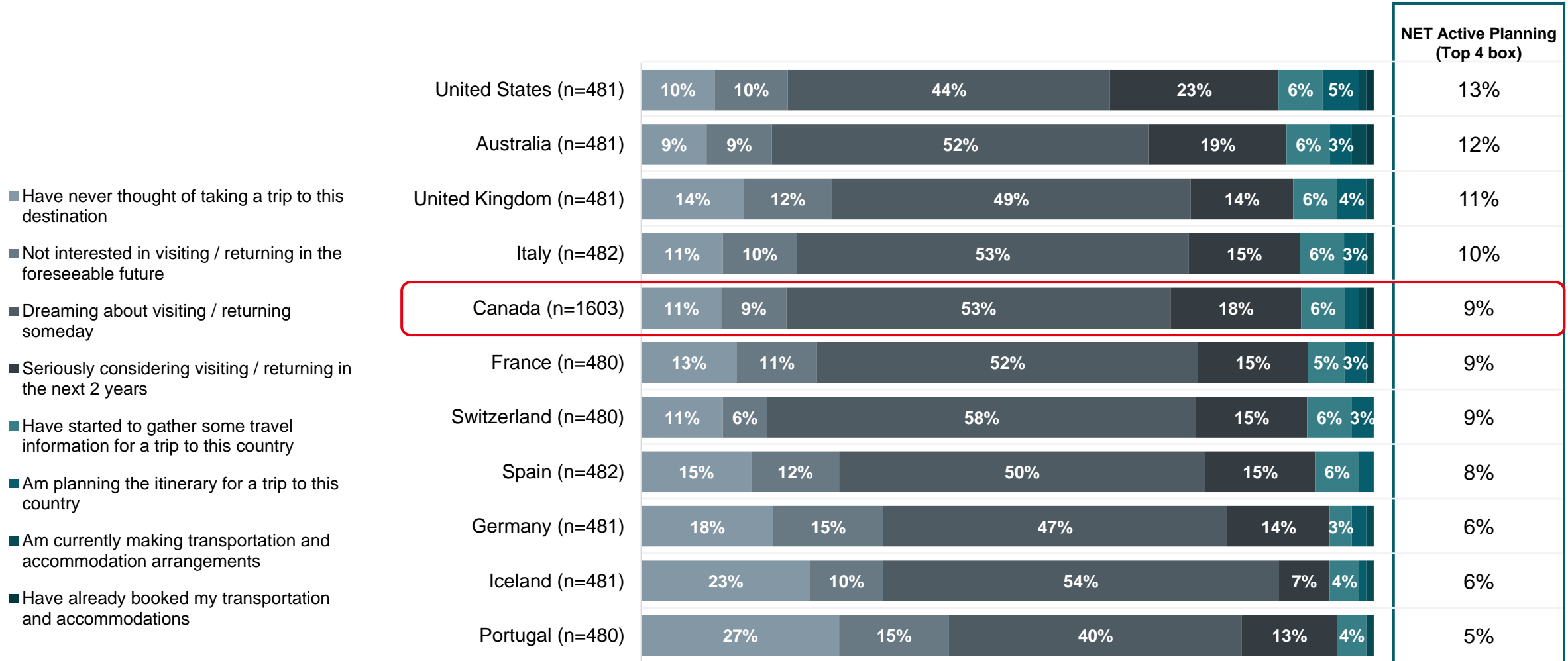
Path to Purchase for Canada



- Have already booked my transportation and accommodations
- Am currently making transportation and accommodation arrangements
- Am planning the itinerary for a trip to this country
- Have started to gather some travel information for a trip to this country
- Seriously considering visiting / returning in the next 2 years
- Dreaming about visiting / returning someday
- Not interested in visiting / returning in the foreseeable future
- Have never thought of taking a trip to this destination



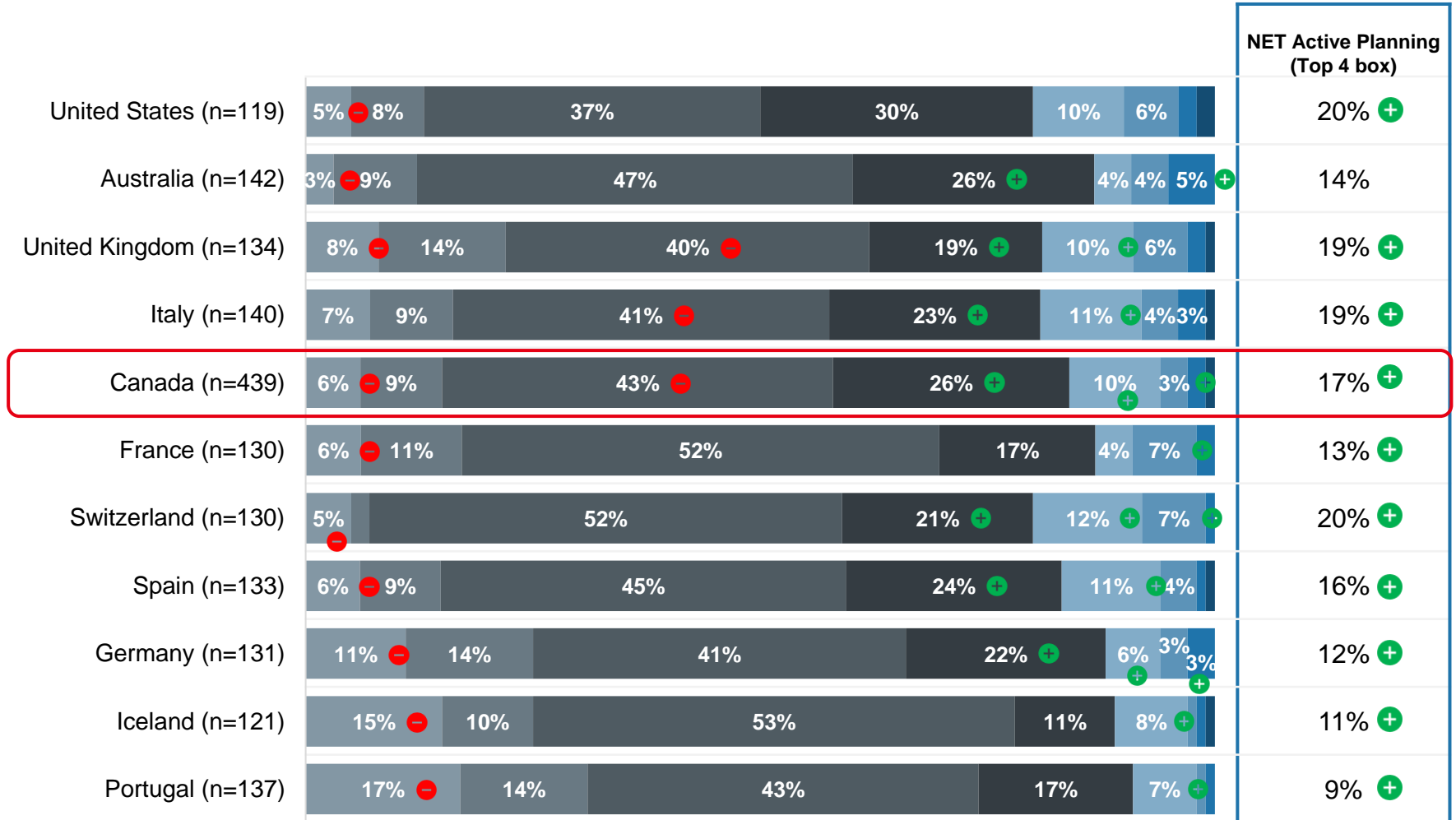
Stage in the Purchase Cycle: Total South Korea



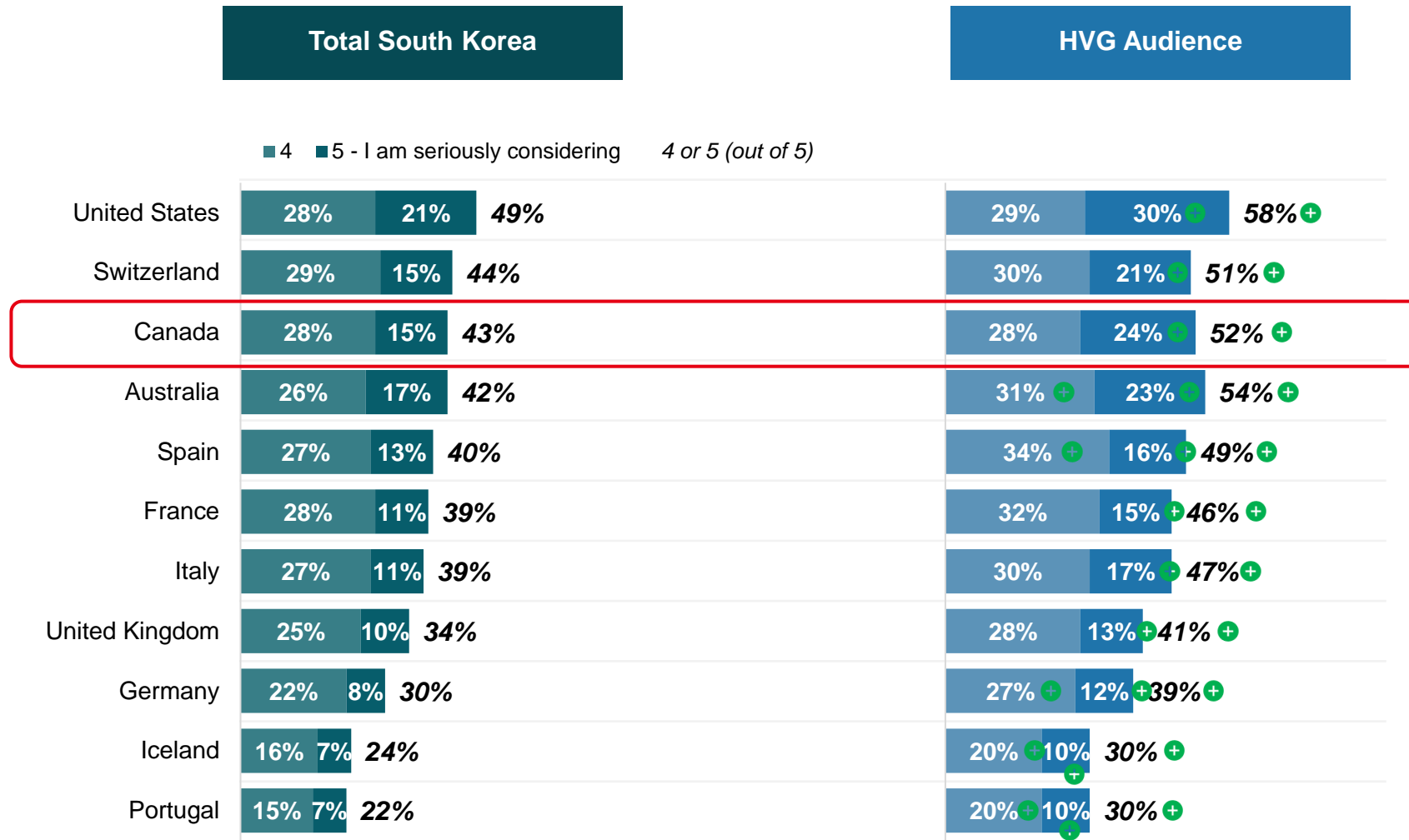
Stage in the Purchase Cycle: Among HVG Audience



- Have never thought of taking a trip to this destination
- Not interested in visiting / returning in the foreseeable future
- Dreaming about visiting / returning someday
- Seriously considering visiting / returning in the next 2 years
- Have started to gather some travel information for a trip to this country
- Am planning the itinerary for a trip to this country
- Am currently making transportation and accommodation arrangements
- Have already booked my transportation and accommodations



Destination Consideration (Next 2 Years)



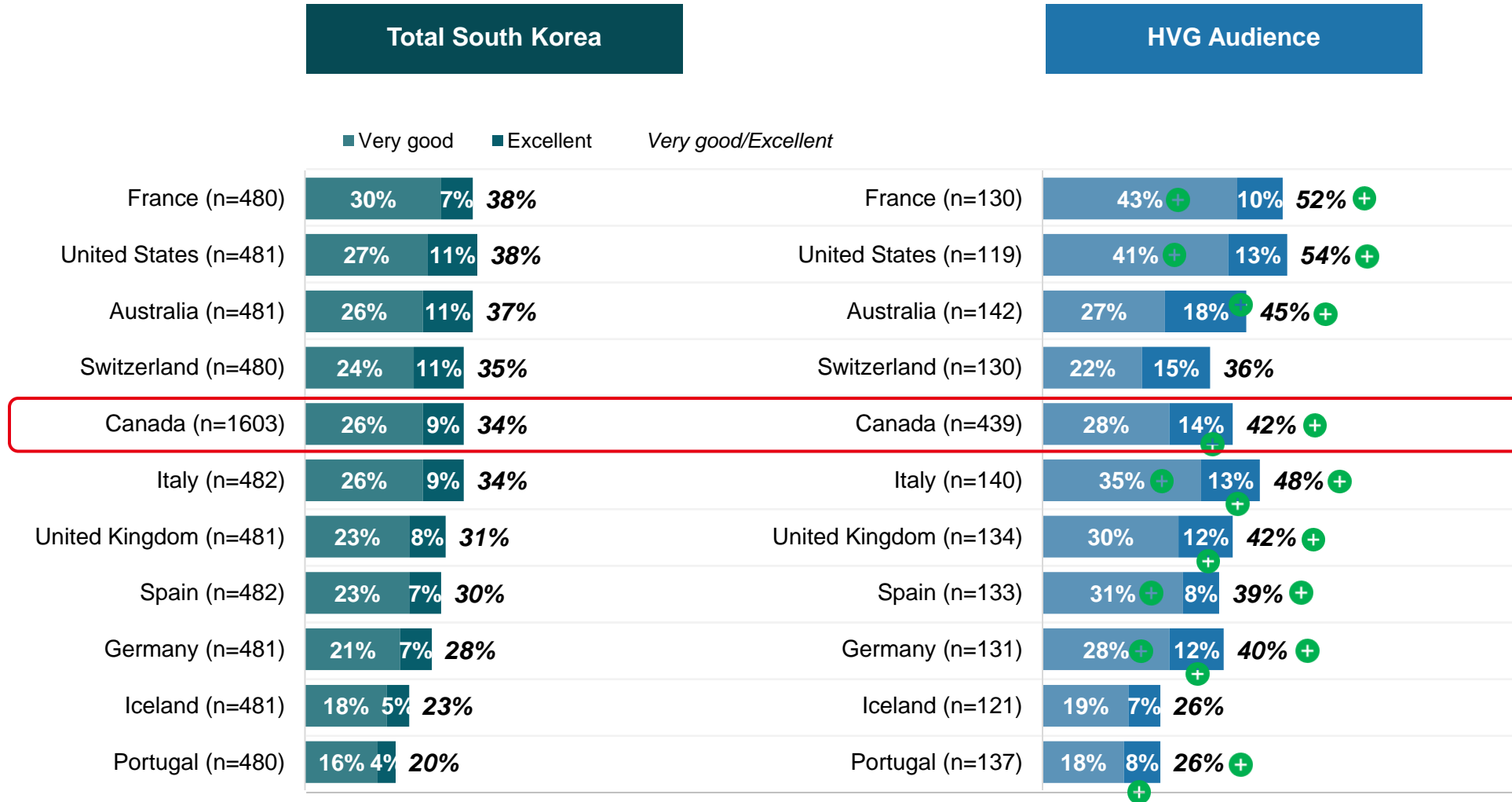
Destination Consideration By Seasons

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%



Knowledge of Holiday Opportunities



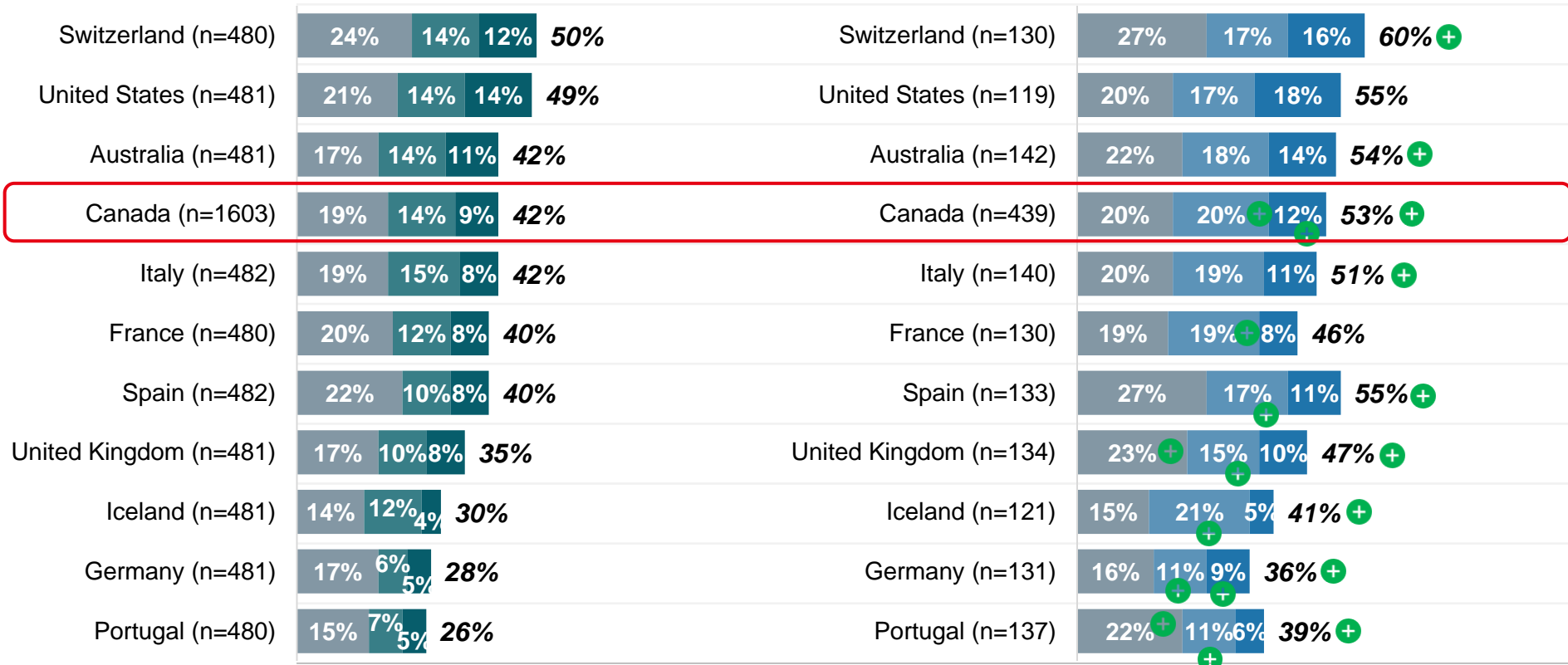
Destination Fit



Total South Korea

HVG Audience

■ 8 ■ 9 ■ 10 - Exactly what I'm looking for Top 3 box



27 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] C3. Please rate each destination in terms of what you are looking for in a holiday destination.

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

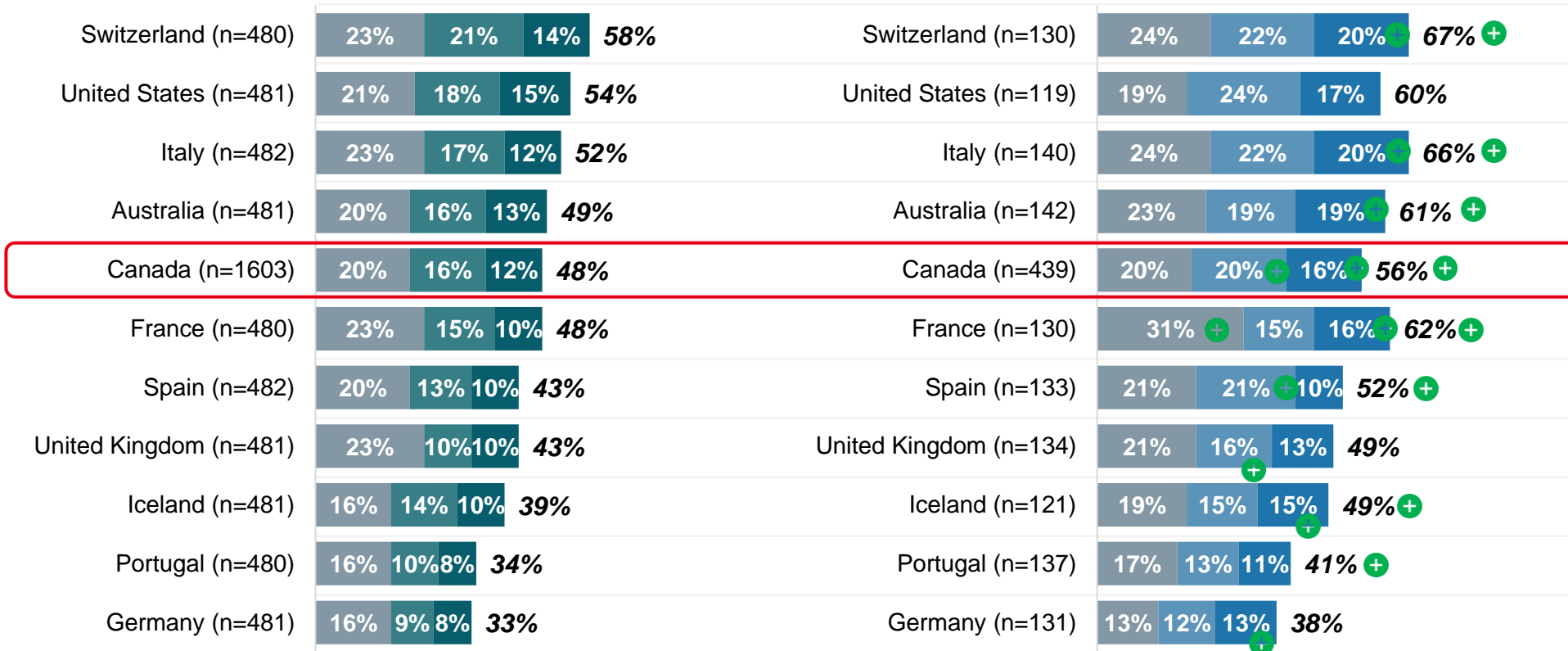


Destination Appeal

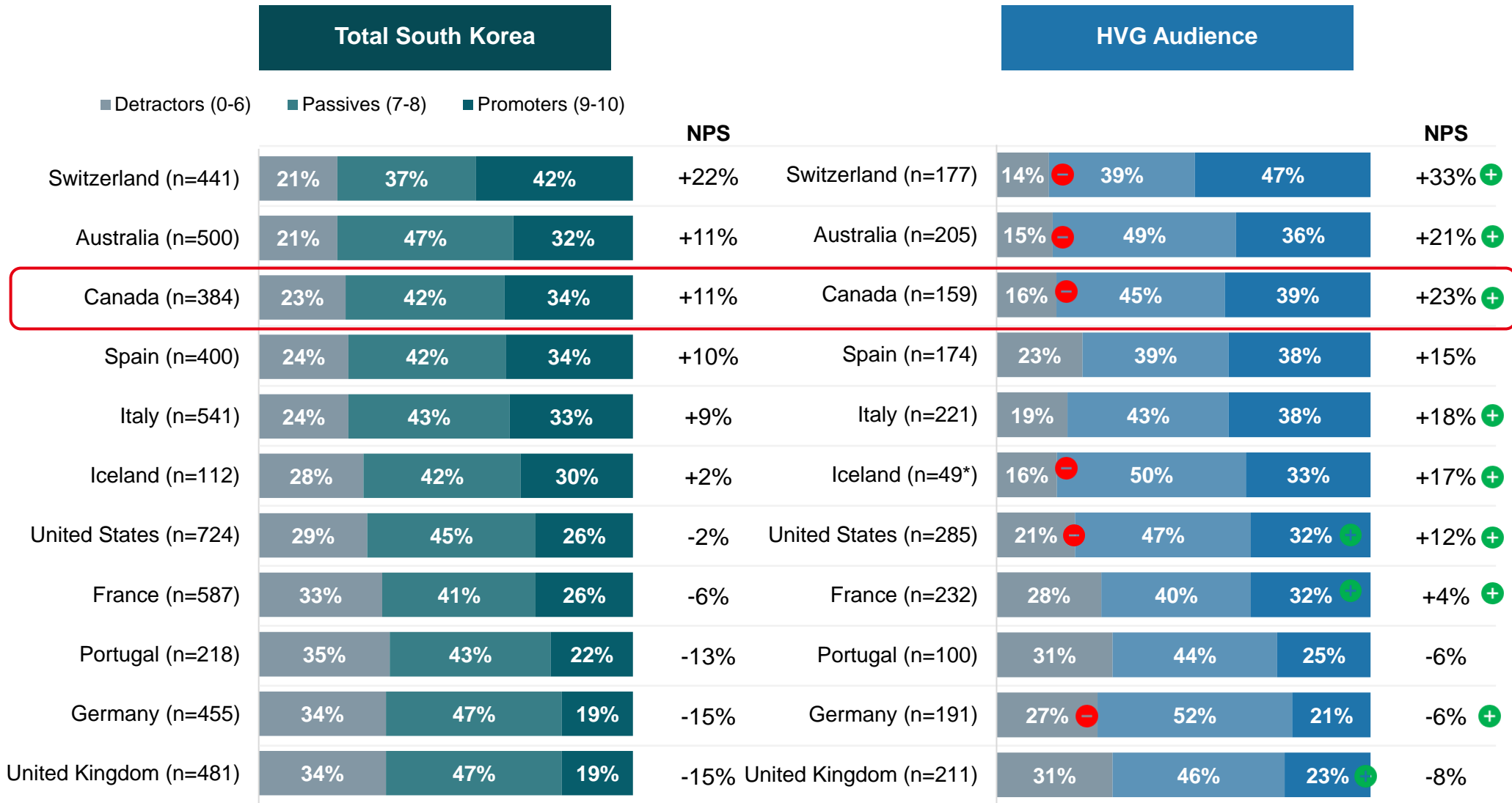
Total South Korea

HVG Audience

■ 8 ■ 9 ■ 10 - Agree completely Top 3 box



Net Promoter Score (NPS)

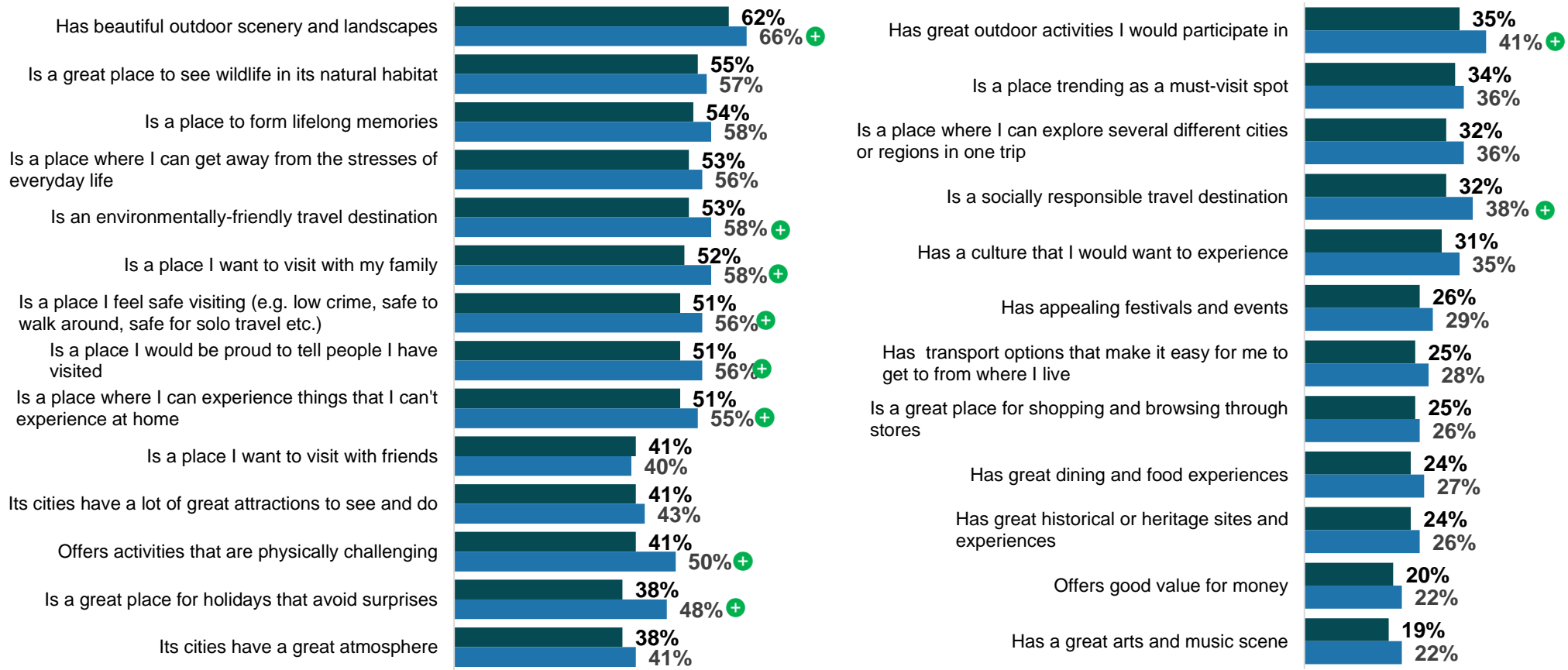


Note: all respondents evaluated countries they have ever visited from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), Visited [DESTINATION]
 C8. How likely are you to recommend each of the following holiday destinations to a friend, family member or colleague?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



Impressions of Canada as a Holiday Destination

■ Total South Korea ■ HVG Audience



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) (n=1603); HVG (n=439) 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.



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



		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							
	Is a place trending as a must-visit spot					Weakness	Strength	Weakness				
To-Do	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					

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.



Destination Attributes – Relative Strengths & Weaknesses : Among HVG Audience

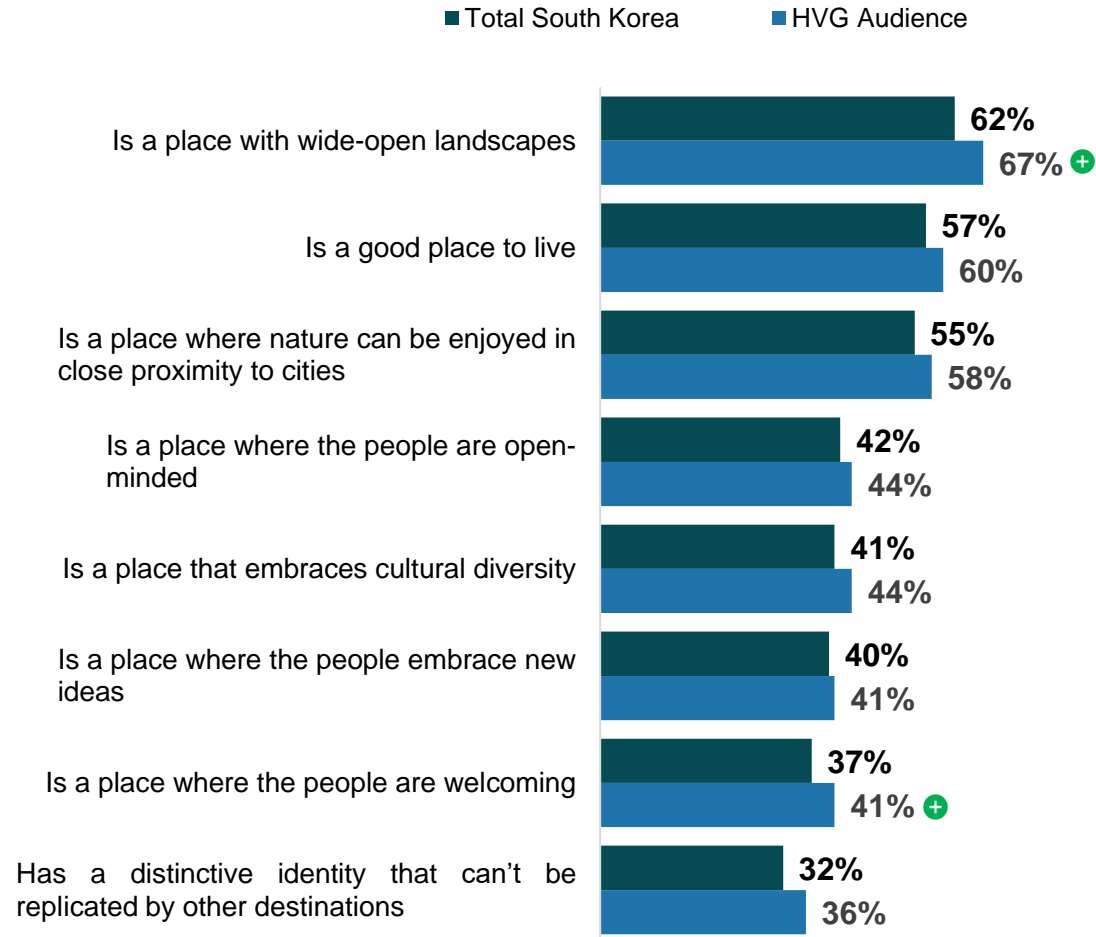


		Canada	Australia	France	Germany	Iceland	Italy	Portugal	Spain	Switzerland	United Kingdom	United States
	n=	439	142	130	131	121	140	137	133	130	134	119
Higher Order Motivations	Is a place where I can get away from the stresses of everyday life					Strength						
	Is a place to form lifelong memories					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
	Is a socially responsible travel destination			Weakness	Strength				Weakness	Strength		Weakness
	Is a place trending as a must-visit spot	Weakness					Strength	Weakness				
To-Do	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	
	Has appealing festivals and events	Weakness	Weakness		Strength	Weakness			Strength	Weakness	Strength	Strength
To-See	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	Strength	Weakness
	Has a culture that I would want to experience	Weakness	Weakness				Strength					

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 for Canada



33 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) (n=1603); HVG (n=439) 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	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

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 HVG Audience



	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

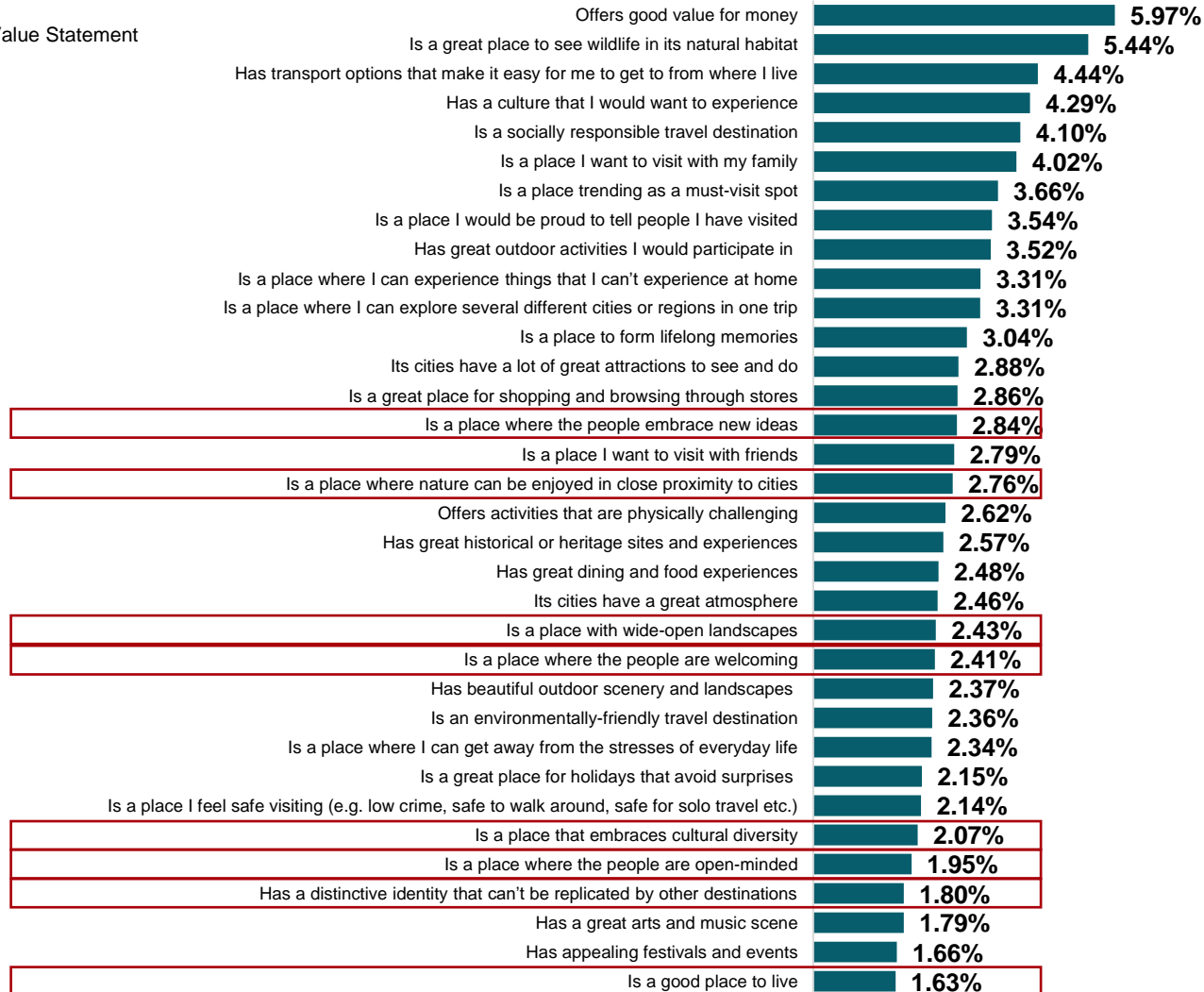
Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years), HVG Audience, Evaluated [DESTINATION]
 C6. We are interested in your general impressions about destinations even if you have never been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



Destination Attributes: Drivers Analysis: Among Total South Korea



= Brand Value Statement



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

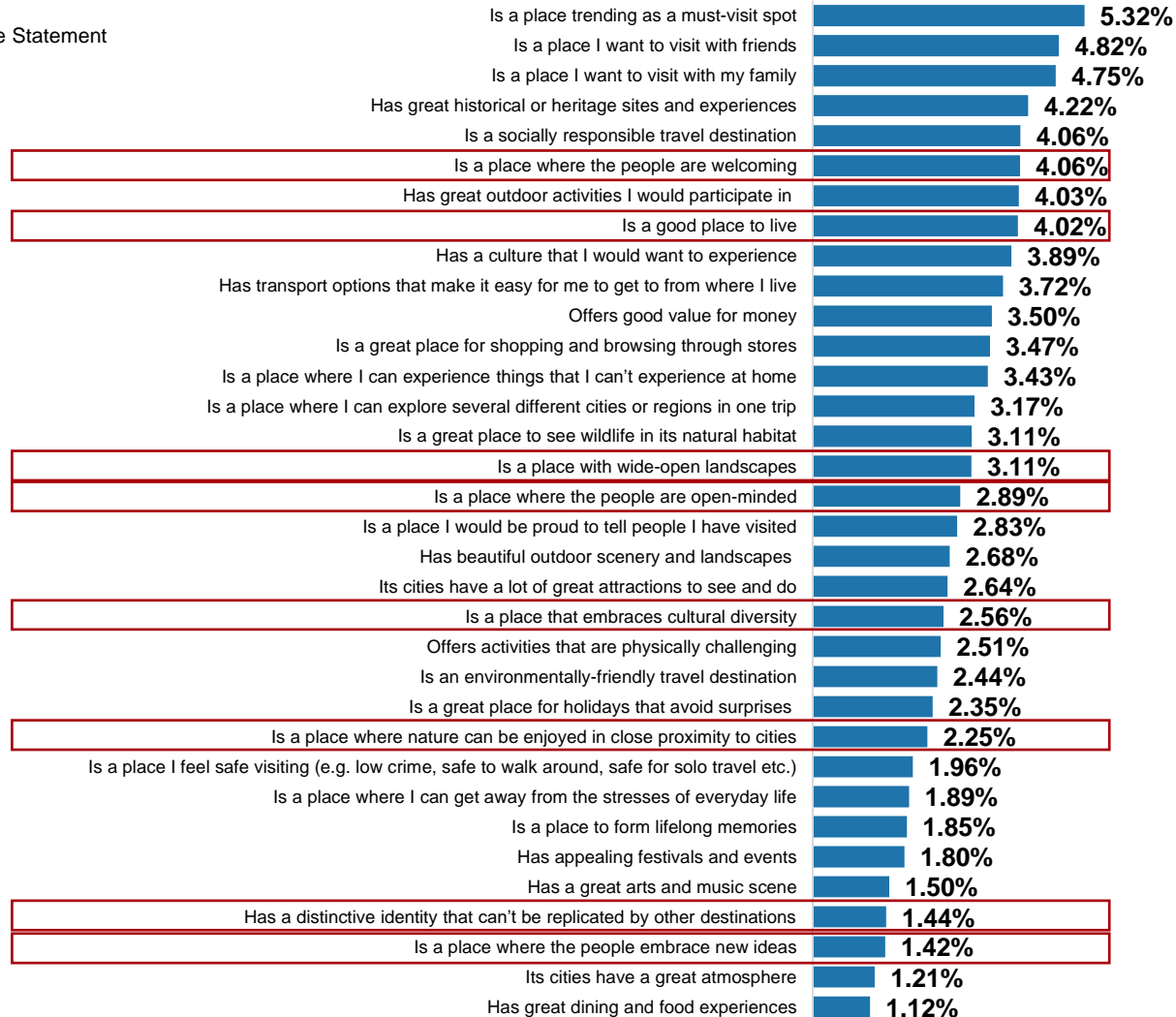
Attributes with a high percentage level are more likely to impact consideration of a destination. This generally means that destinations that score highly on the top attributes may have higher consideration levels. Each percentage does also indicate the degree of relative impact. An attribute with a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



Destination Attributes: Drivers Analysis: Among HVG Audience



= Brand Value Statement



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%.





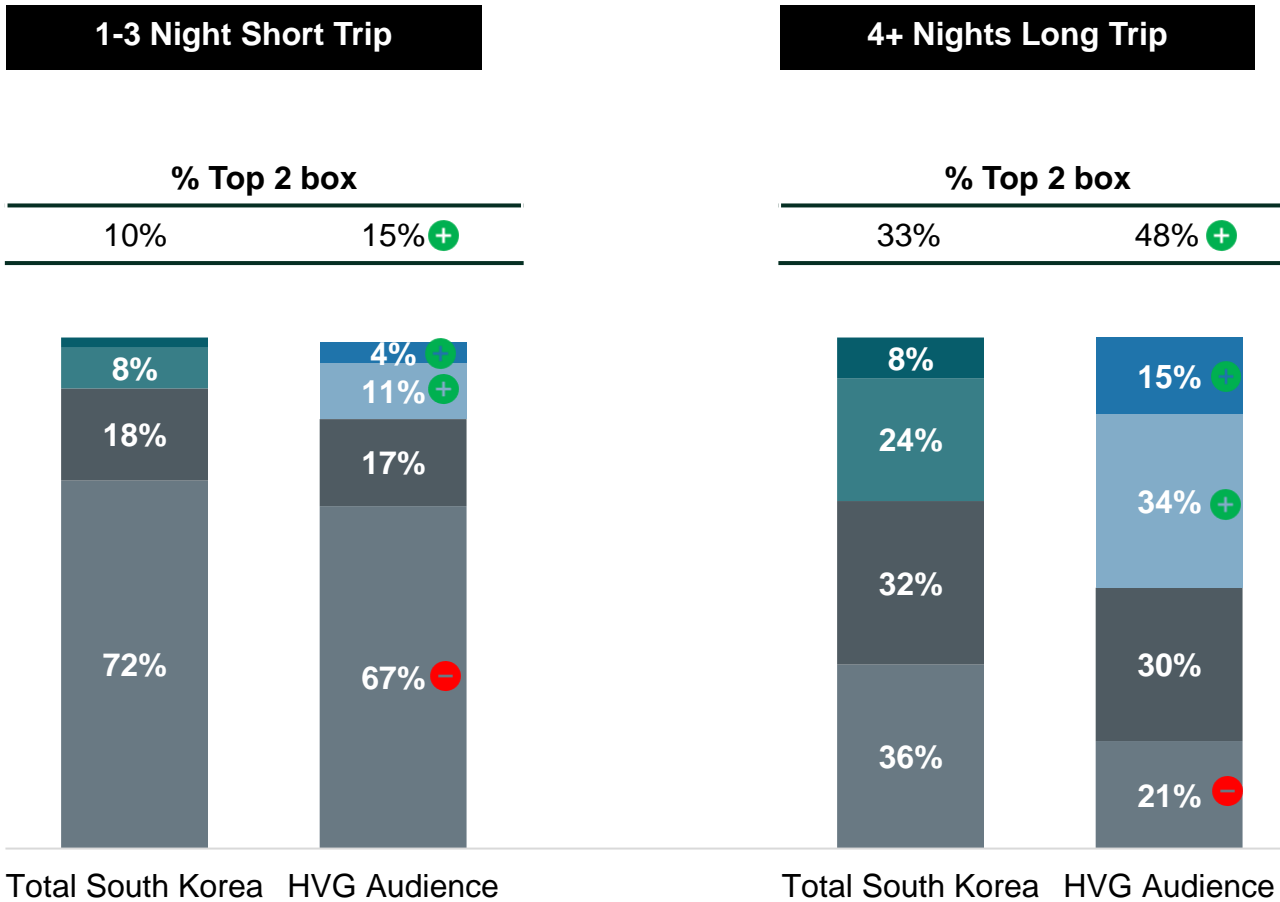
Travel Intentions to Canada



 Toronto
Ontario



Likelihood to Take a Holiday Trip to Canada (Next 2 Years)



**NET: Definitely/
Very Likely to
visit Canada in
the next 2 years**

**Total: 38%
HVG: 53% (+)**

39 Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603); HVG (n=439)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)



Canadian Destinations Likely to Visit

Total South Korea
HVG Audience

Northwest Territories
11% 13%
7% 9% Yellowknife
3% 4% Inuvik
3% 2% Other – NWT

Nunavut
3% 5%+
2% 3%+ Iqaluit
1% - Other – NU

Quebec
55% 58%
35% 42%+ Montréal
38% 42% Québec City
19% 19% Mont Tremblant
6% 7% Other – QC

Yukon
8% 10%
5% 7% Whitehorse
3% 5% Dawson City
1% 2% Other – YT

Newfoundland & Labrador
10% 11%
8% 9% St. John's
3% 4% Other - NL

British Columbia
46% 53%+
24% 29%+ Rocky Mountains
36% 44%+ Vancouver
21% 27%+ Victoria
8% 11%+ Whistler
3% 3% Okanagan
2% 4% Other – BC

Prince Edward Island
5% 6%
5% 5% Charlottetown
2% 1% Other - PEI

Alberta
26% 32%+
18% 23%+ Rocky Mountains
13% 19%+ Calgary
6% 7% Edmonton
8% 9% Banff
4% 6% Jasper
3% 3% Other – AB

New Brunswick
4% 5%
2% 3% Fredericton
3% 3% Saint John
1% 1% Other - NB

Saskatchewan
7% 8%
3% 4% Regina
3% 4% Saskatoon
2% 3% Other – SK

Manitoba
6% 6%
4% 5% Winnipeg
3% 3% Churchill
1% 2% Other – MB

Ontario
53% 59%+
20% 29%+ Ottawa
43% 48%+ Niagara Falls
36% 40%+ Toronto
4% 5% Muskoka
3% 4% Other – ON

Nova Scotia
4% 5%
2% 2% Halifax
2% 3% Cape Breton
1% 1% Other - NS



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



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)

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)

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)

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)

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)

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

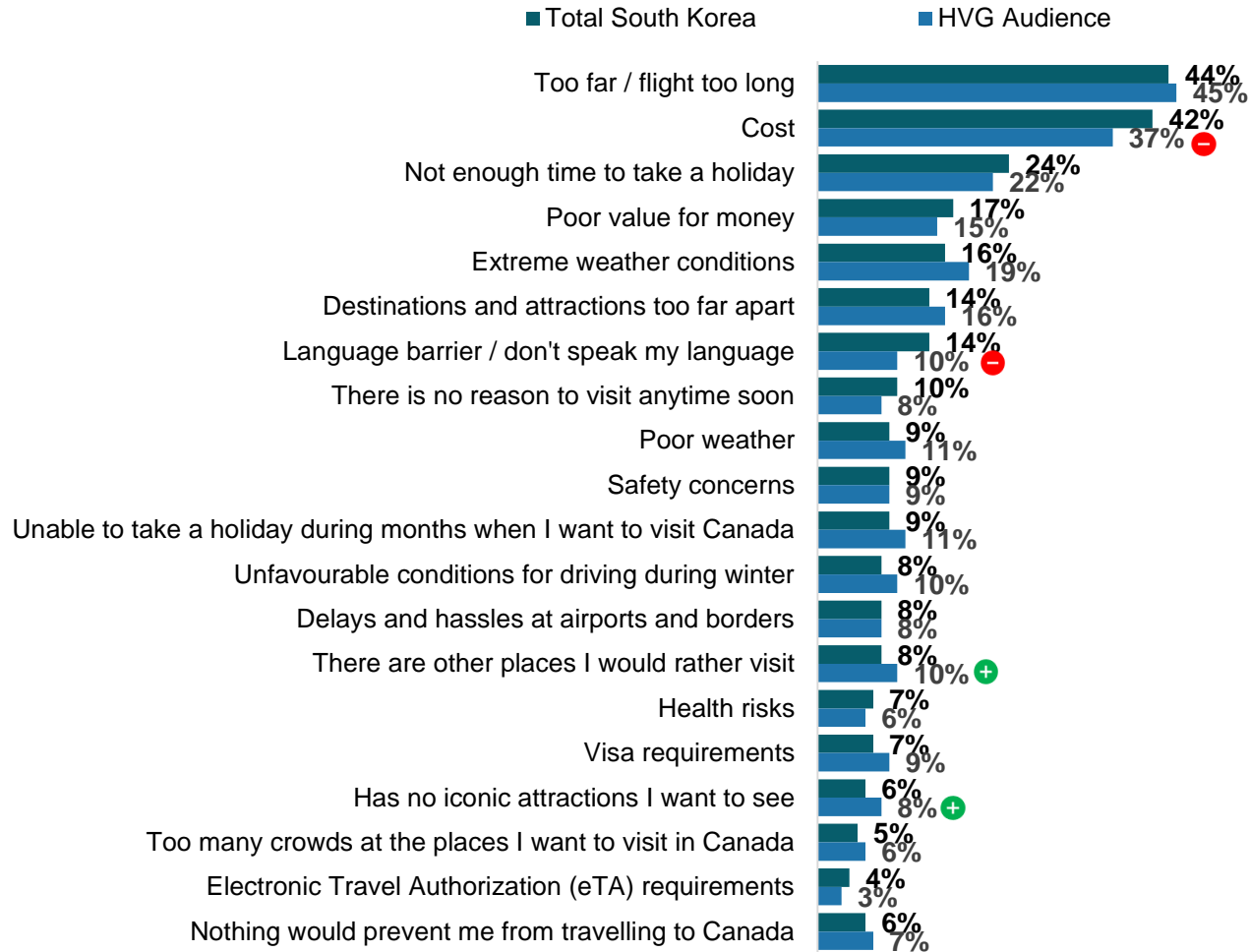
2%	2%	Winter (Dec, Jan, Feb)
3%	3%	Spring (Mar, Apr, May)
3%	3%	Summer (Jun, Jul, Aug)
3%	4%	Fall (Sept, Oct, Nov)

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)



Barriers for Visiting Canada





Travel Behaviours



Churchill

Manitoba



Top 10 Activities Interested In & Trip Anchors

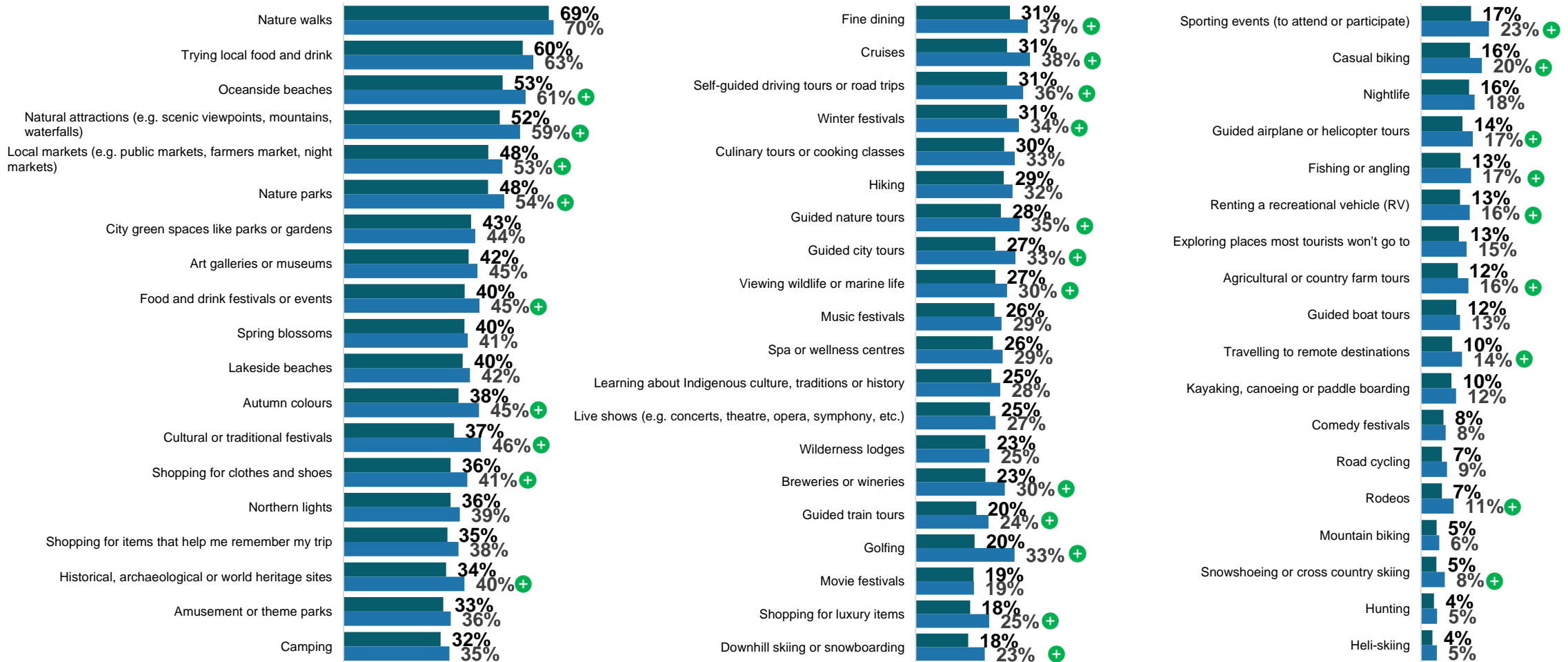
Top 10 General Activities Interested In	
Total South Korea (n=1603)	HVG Audience (n=439)
Nature walks	Nature walks
Trying local food and drink	Trying local food and drink
Oceanside beaches	Oceanside beaches +
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls) +
Local markets (e.g. public markets, farmers market, night markets)	Nature parks +
Nature parks	Local markets (e.g. public markets, farmers market, night markets) +
City green spaces like parks or gardens	Cultural or traditional festivals +
Art galleries or museums	Food and drink festivals or events +
Food and drink festivals or events	Autumn colours +
Spring blossoms	Art galleries or museums

Top 10 Trip Anchor Activities	
Total South Korea (n=1592)	HVG Audience (n=438)
Trying local food and drink	Trying local food and drink
Nature walks	Nature walks
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls) +
Oceanside beaches	Local markets (e.g. public markets, farmers market, night markets) +
Local markets (e.g. public markets, farmers market, night markets)	Oceanside beaches
Nature parks	Nature parks
Art galleries or museums	Art galleries or museums
Historical, archaeological or world heritage sites	Historical, archaeological or world heritage sites +
Northern lights	Northern lights +
Food and drink festivals or events	Food and drink festivals or events



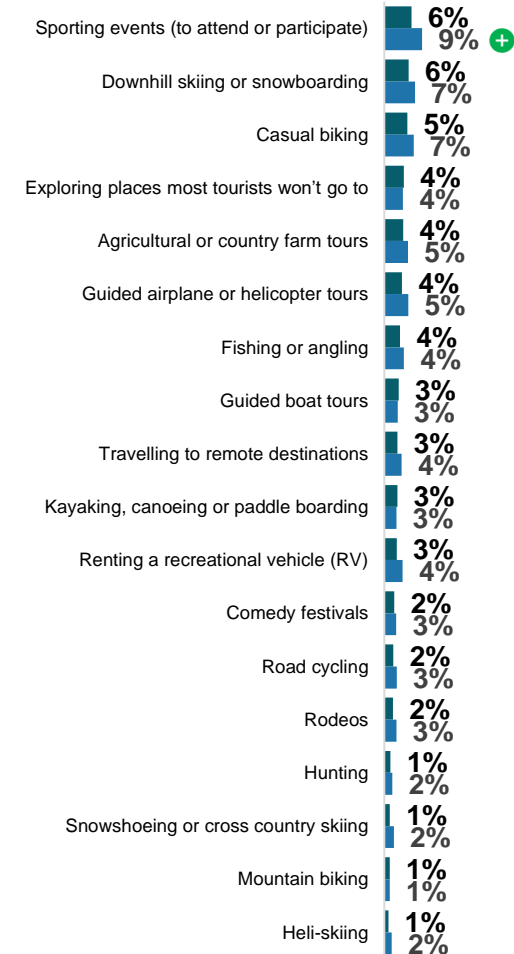
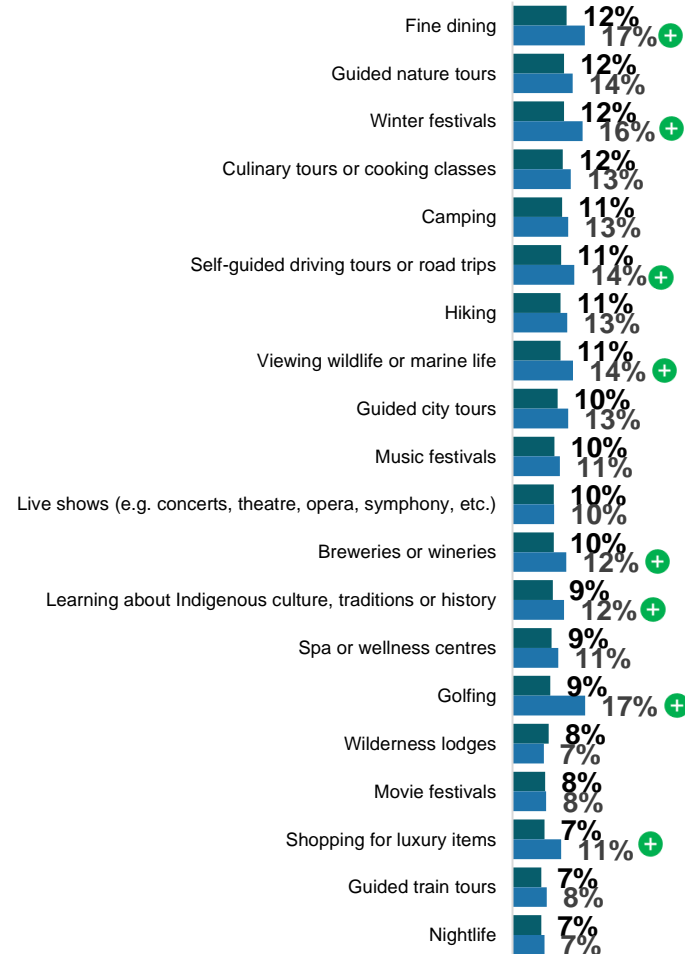
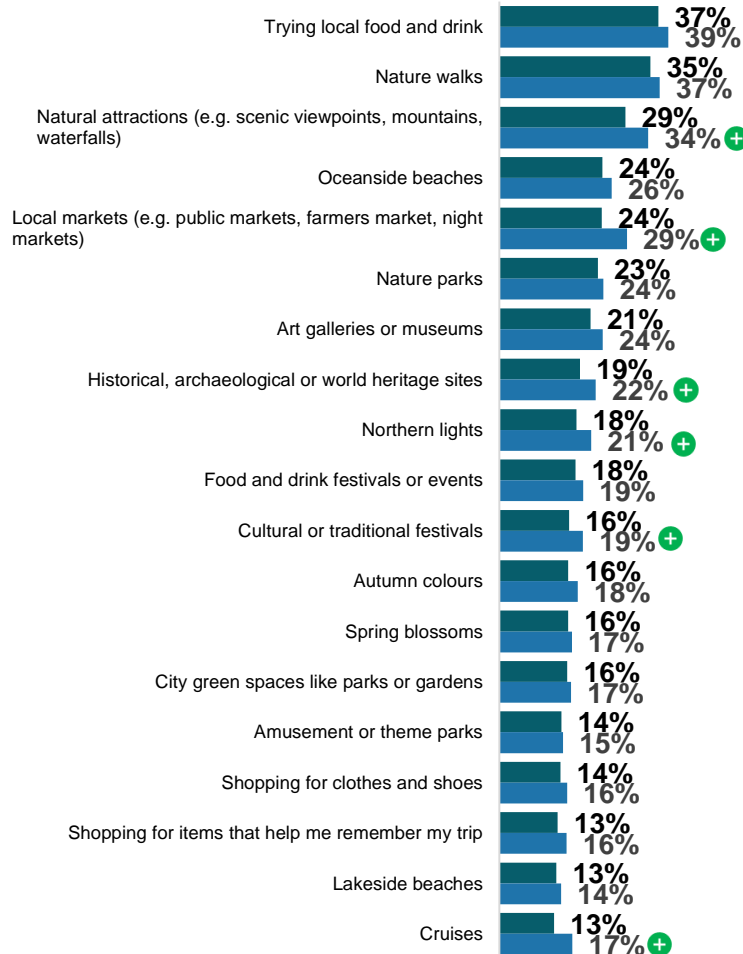
General Activities Interested In

■ Total South Korea ■ HVG Audience

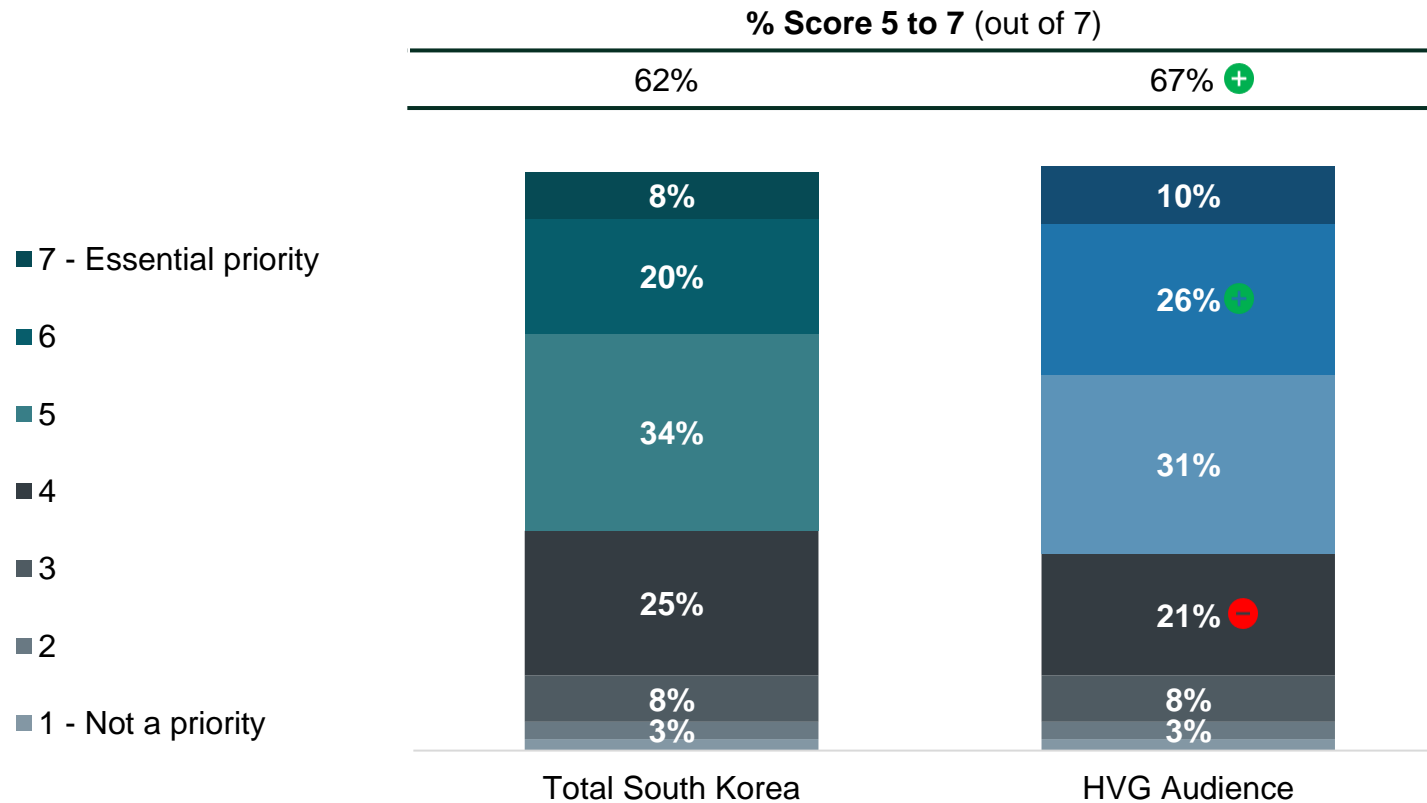


Trip Anchor Activities

■ Total South Korea ■ HVG Audience



Priority of Sustainable Travel When Planning a Trip

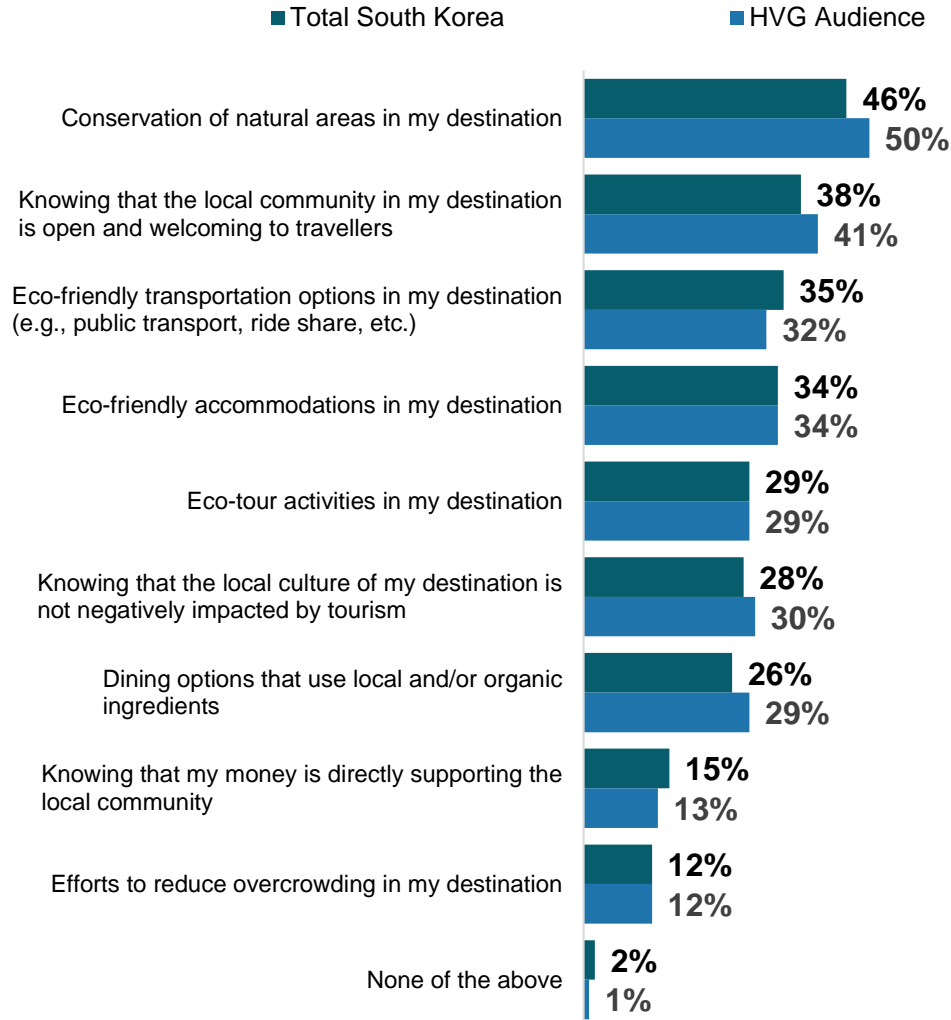


Sustainable Travel Description

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”.

47 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'.

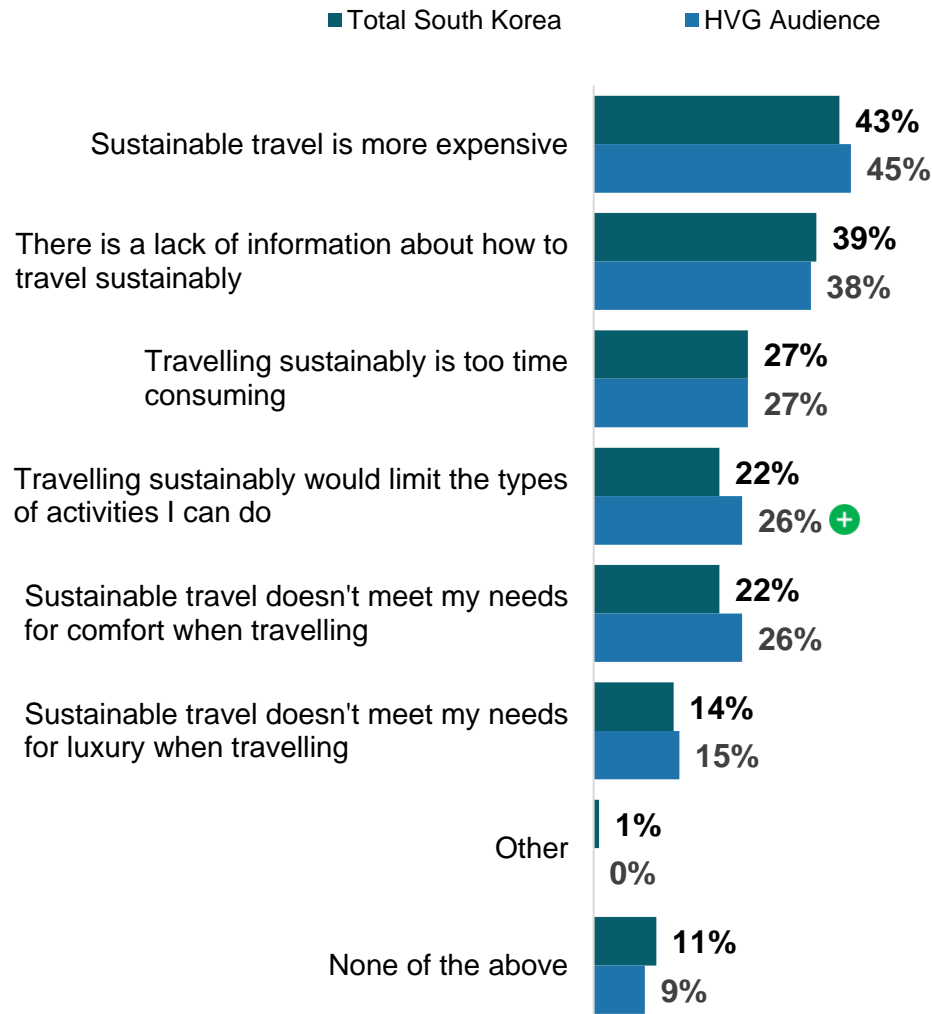
Top 3 Most Important Sustainability Efforts



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”.

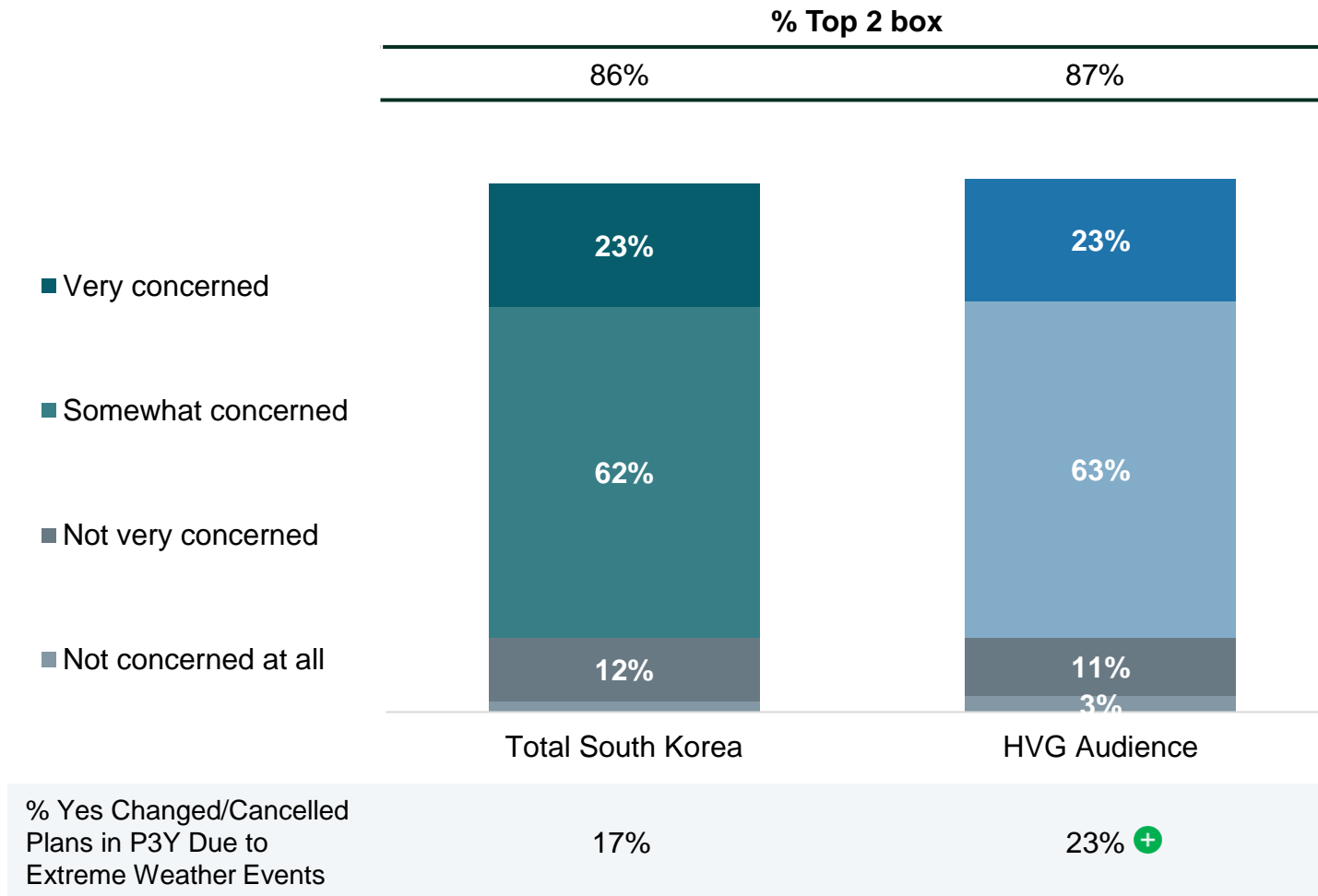
Barriers to Sustainable Travel



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”.

Impact of Extreme Weather Events on Travel Plans

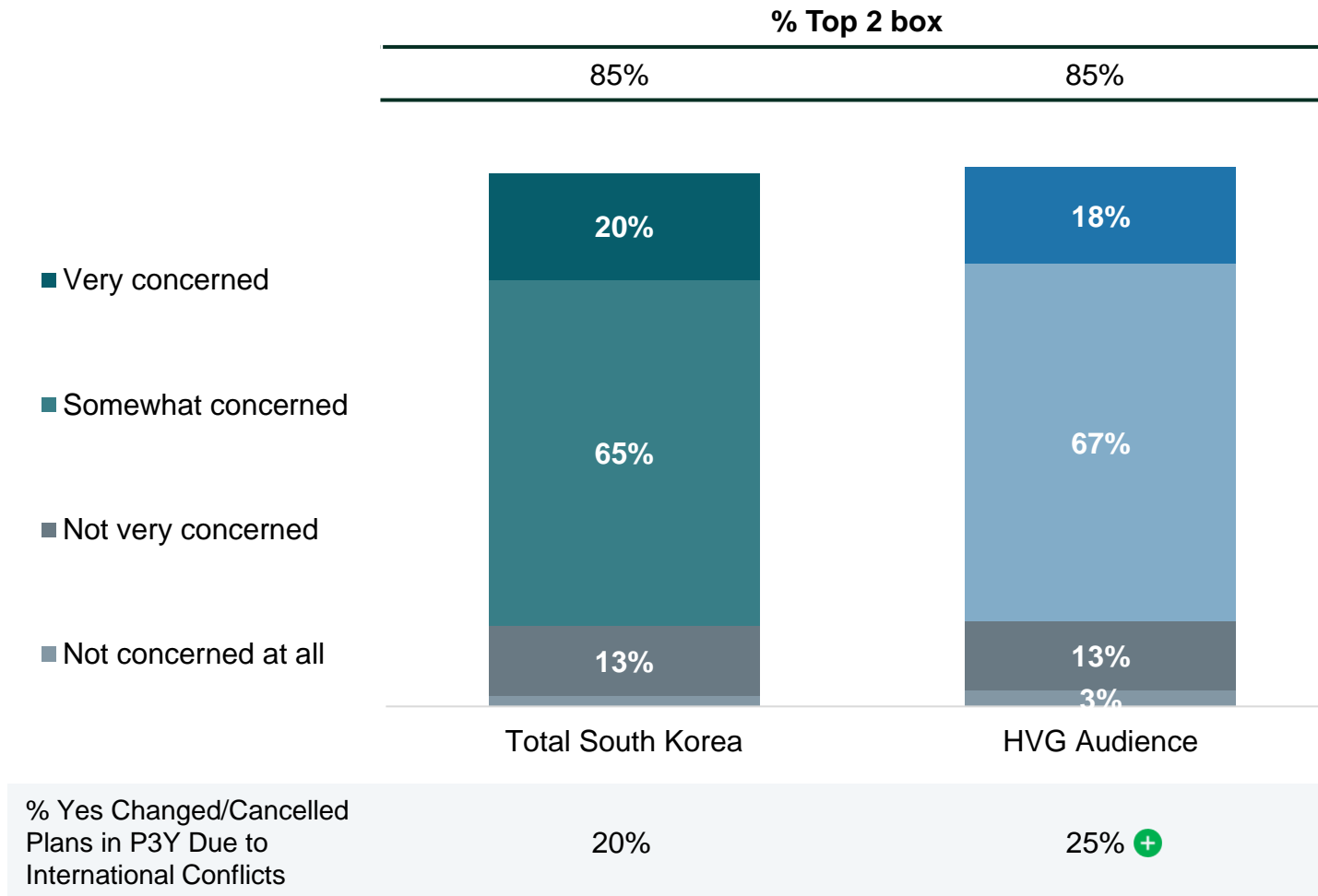


Extreme Weather Events Description

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.



Impact of International Conflicts & Unrest on Travel Plans



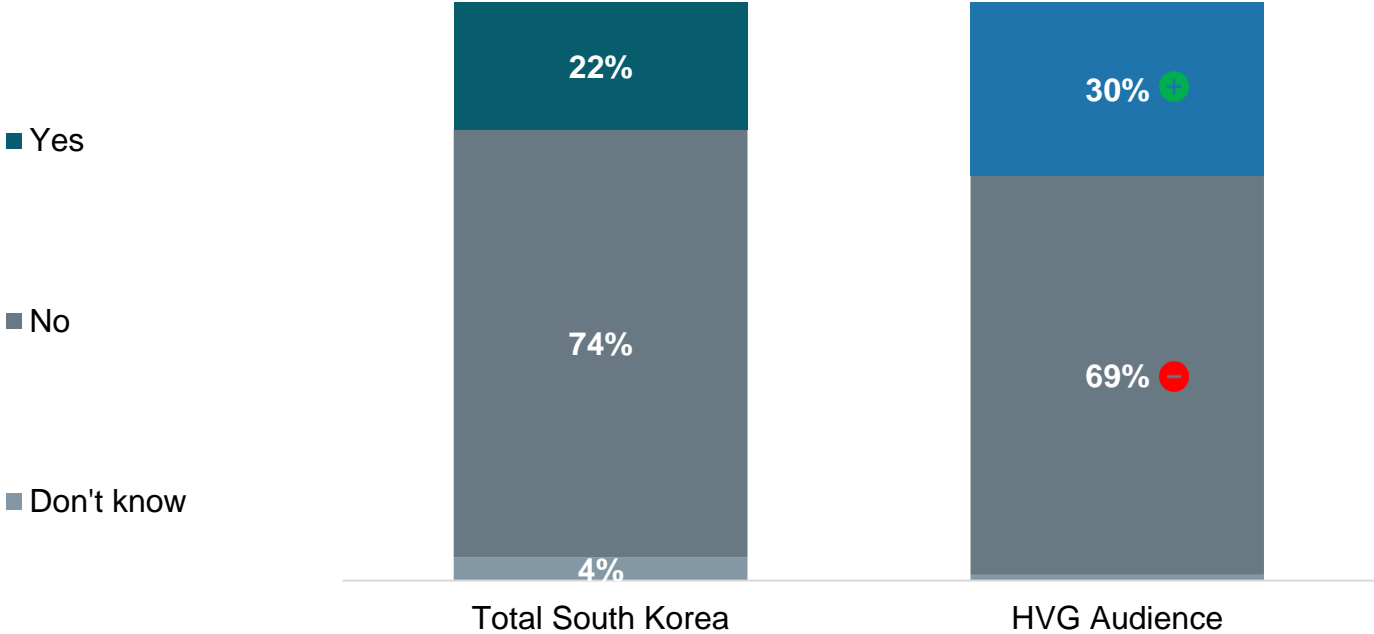
International Conflicts Description

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?



Usage of AI Tools to Plan Trips





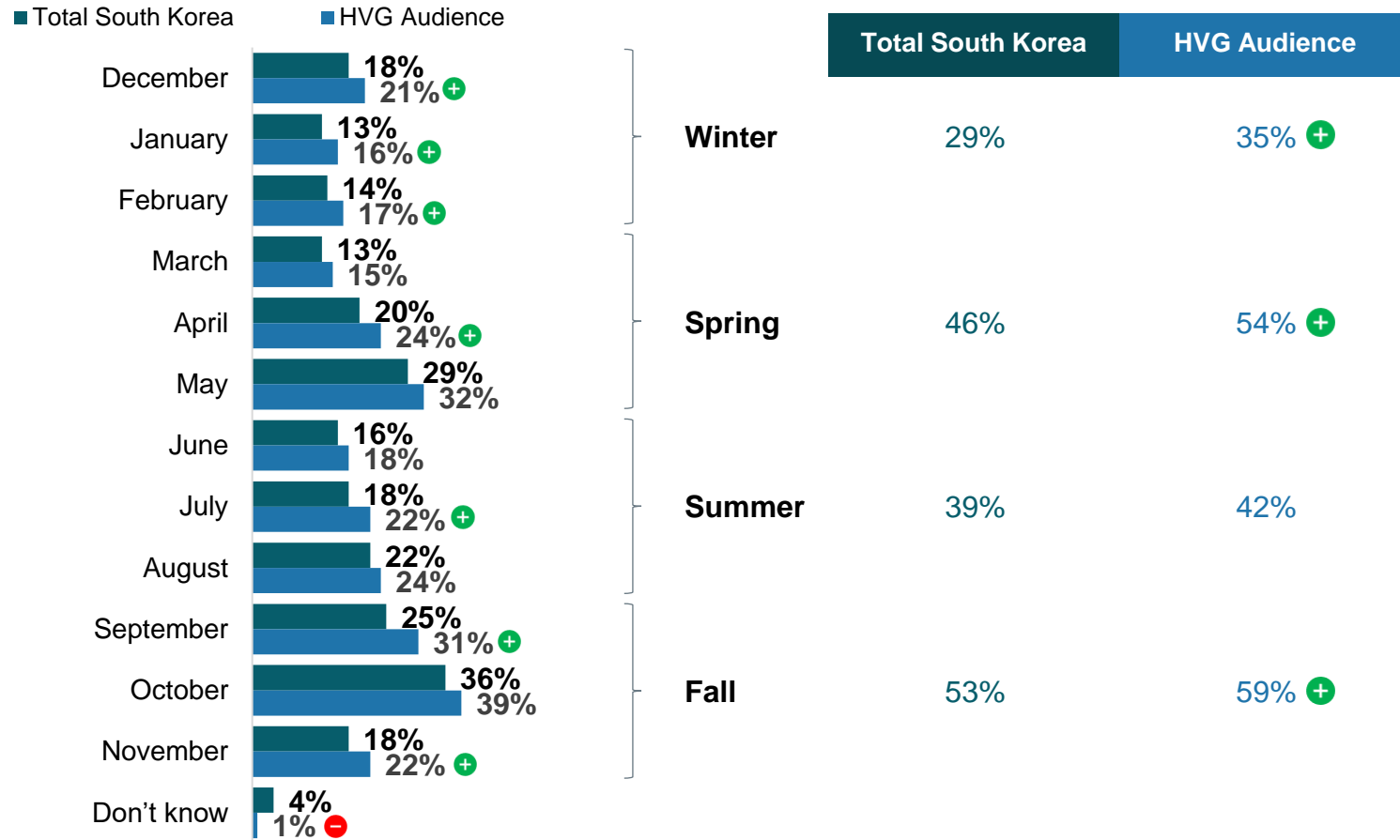
Seasonal Travel



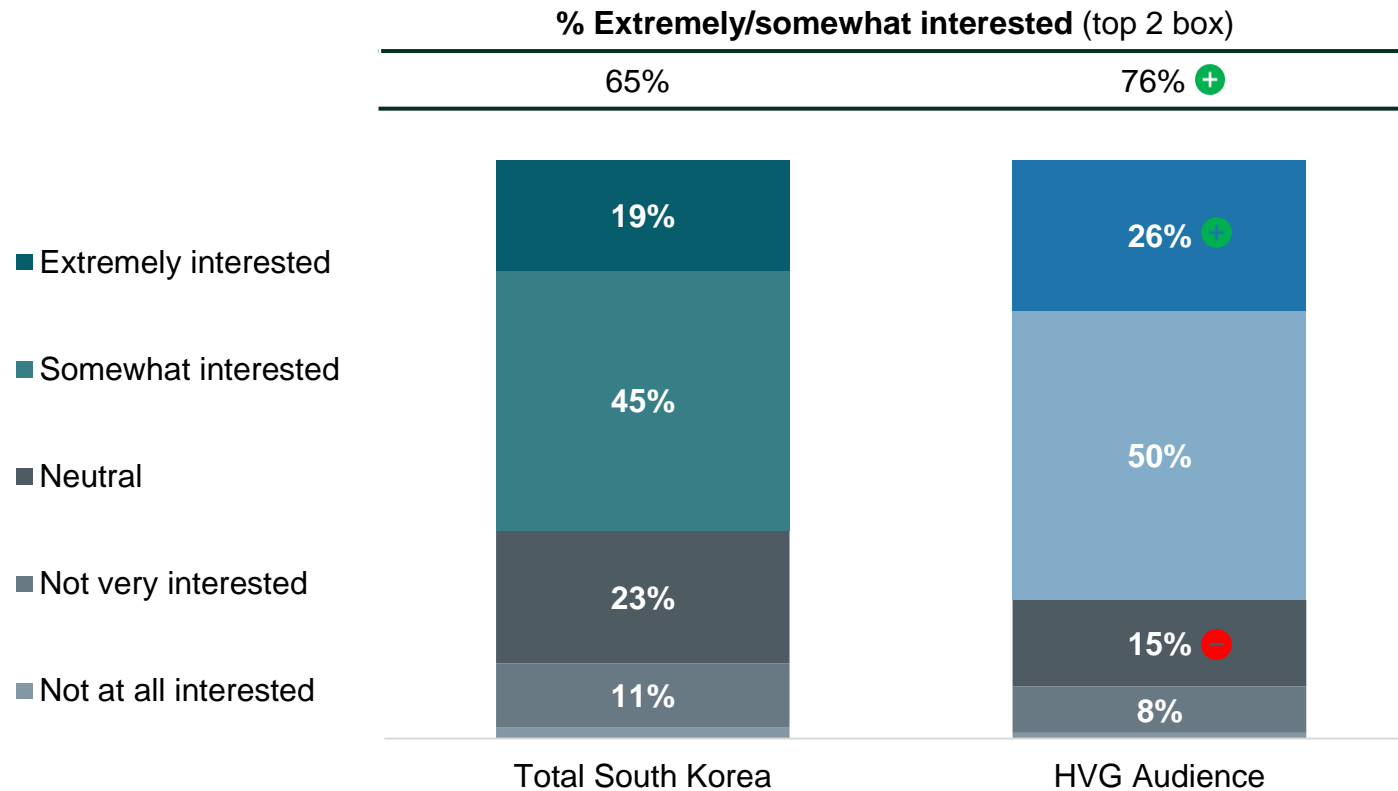
Yellowknife
Northwest Territories



Preferred Time of Year for Holiday Trips



Interest in Winter Holidays



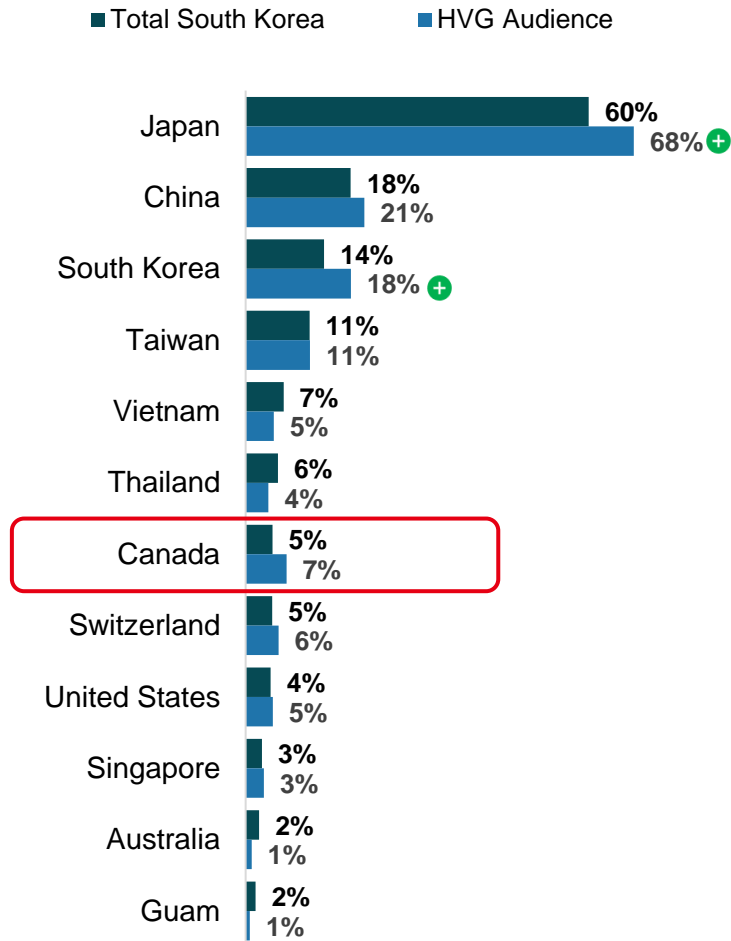
Winter Season Description

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.

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



Unaided Winter Destinations



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.

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

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=766); HVG (n=214)

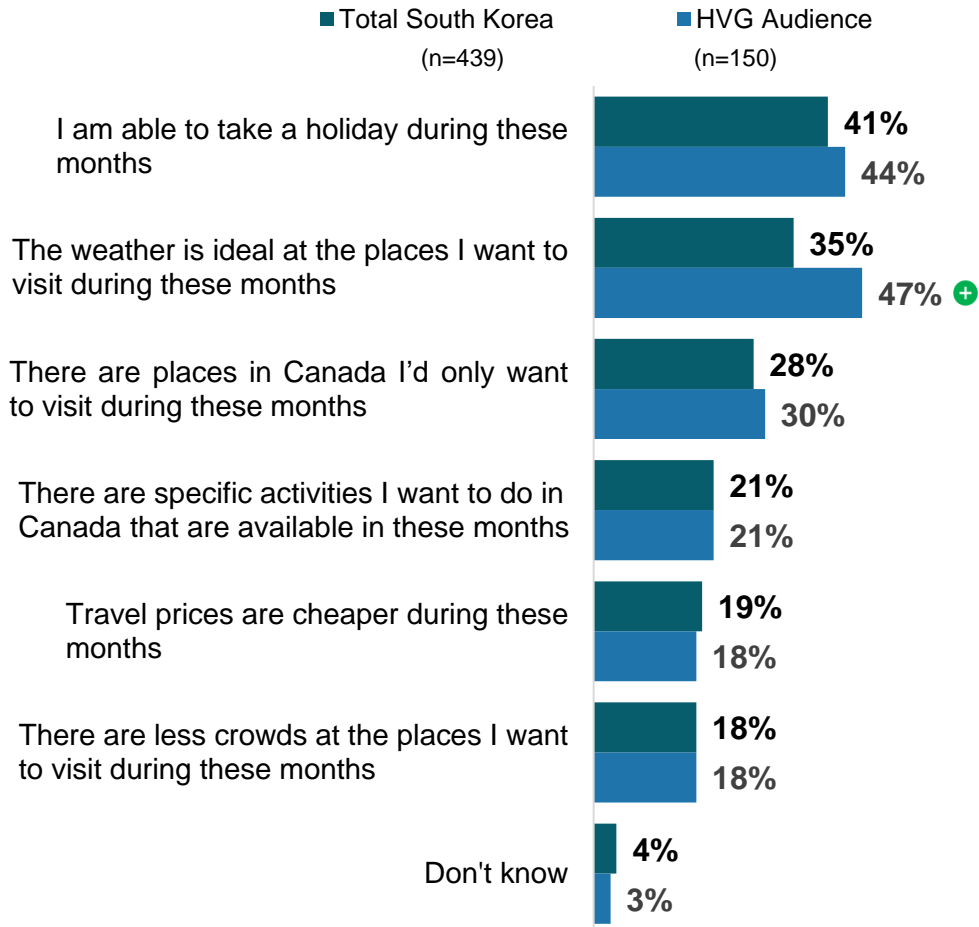
B2. What destinations come to mind when thinking about travel to experience the **winter season**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan).) [DESCRIPTION] Please note: You do not have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



Motivators & Barriers for Winter Travel to Canada



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**?

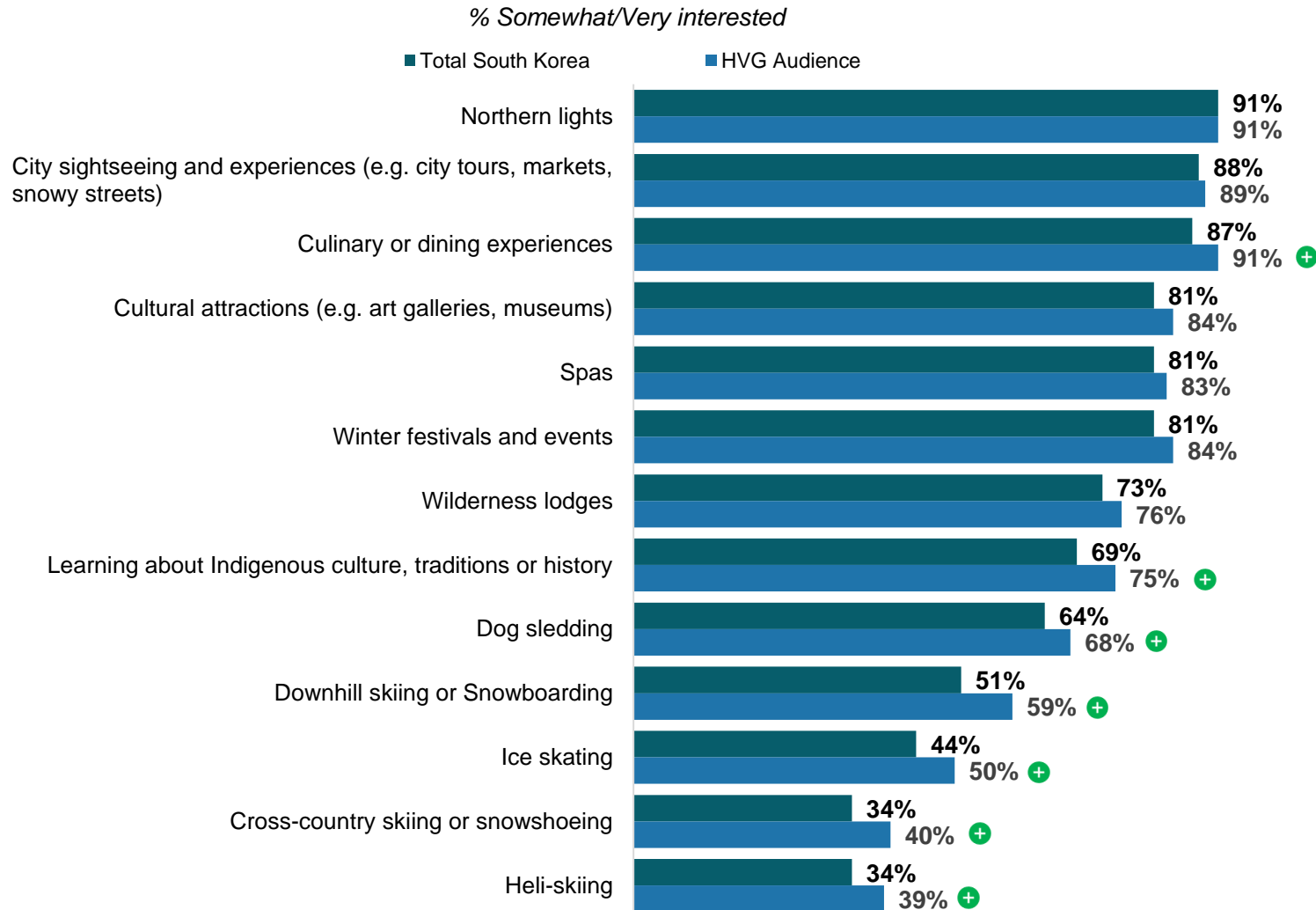
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in December, January or February E9. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of December, January and/or 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)

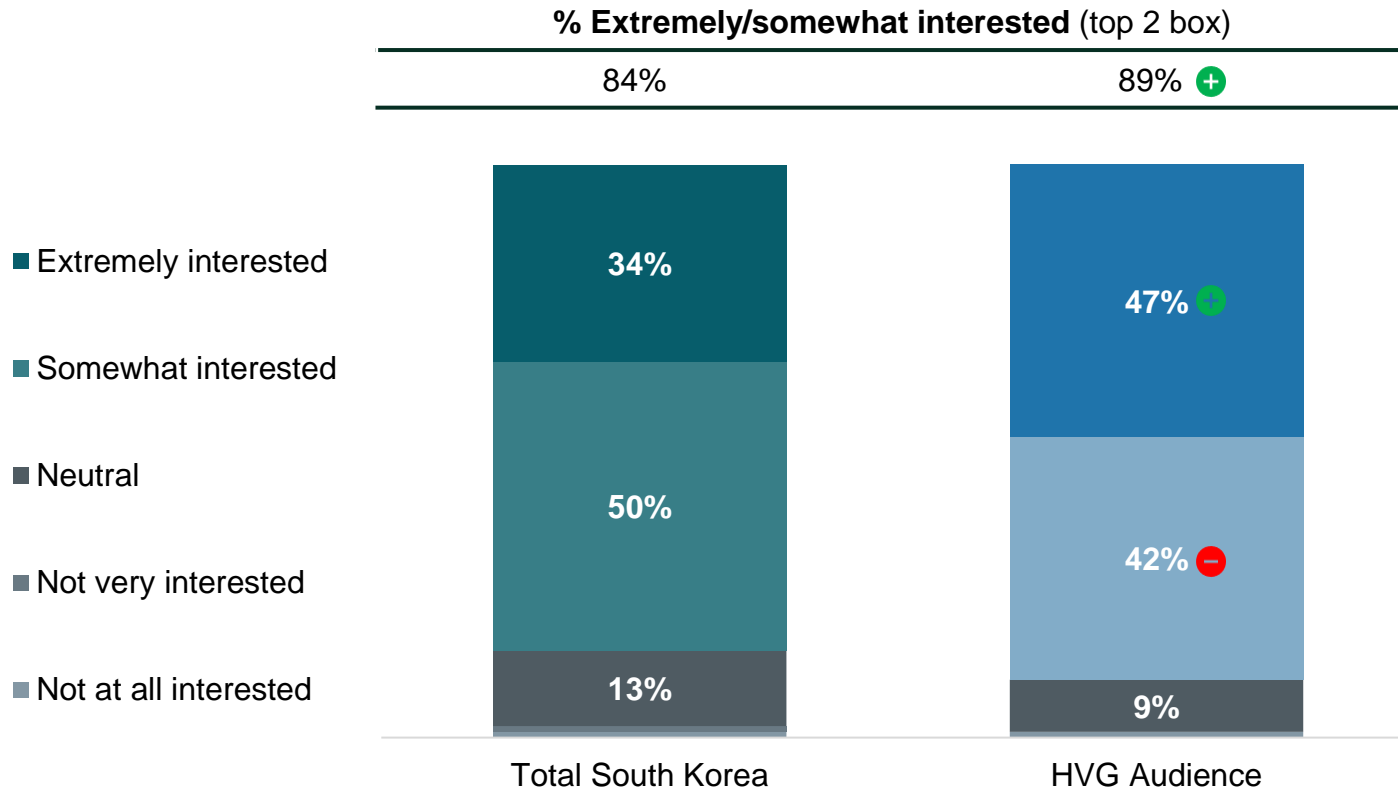
South Korea GTRP – December 2023



Interest in Winter Activities in Canada



Interest in Fall Holidays



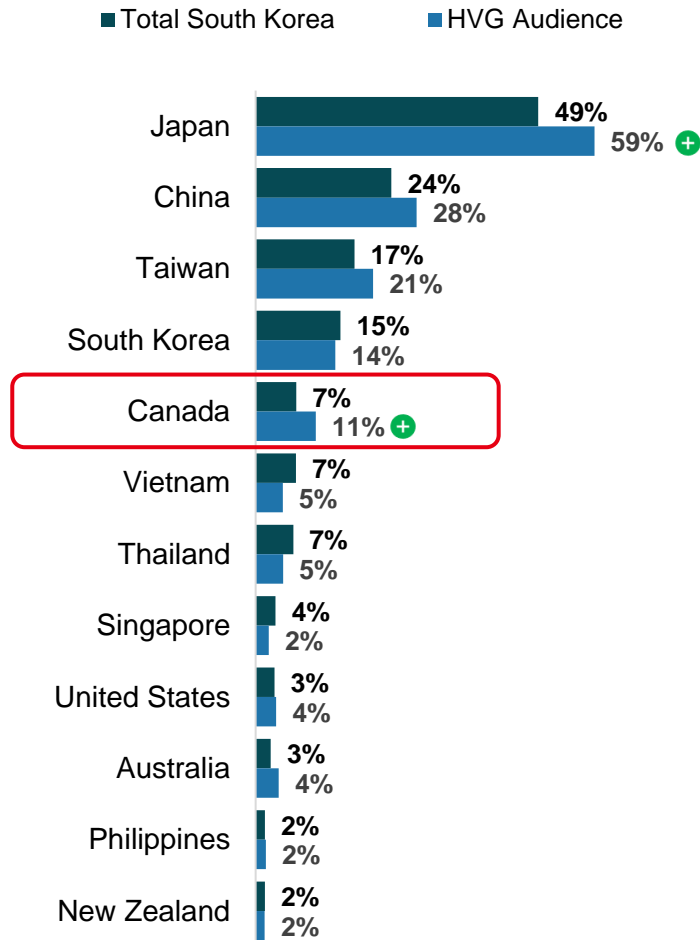
Autumn Season Description

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.

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



Unaided Fall Destinations



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.

Note: respondents were asked either about winter travel (B2/D2) or autumn/fall travel (B3/D3)
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=837); HVG (n=225)

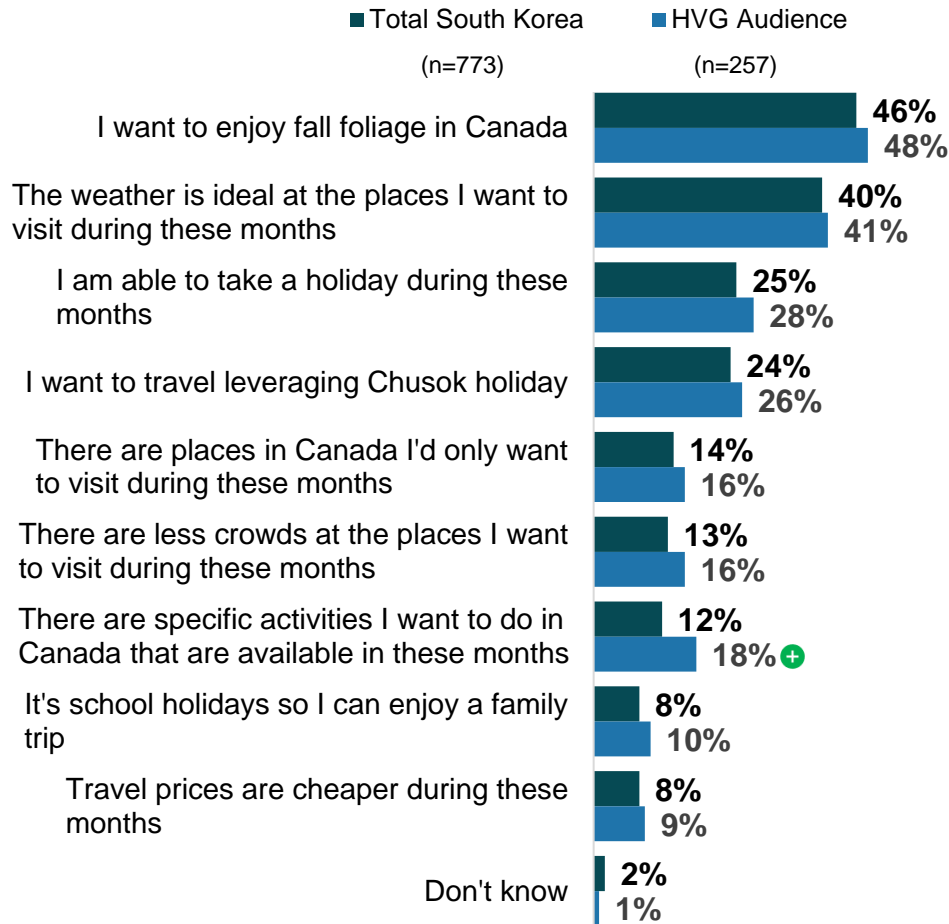
B3. What destinations come to mind when thinking about travel to experience the **autumn season**? (Please list up to 3 destinations. You can mention destinations within or outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan.) [DESCRIPTION] Please note: You do not have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



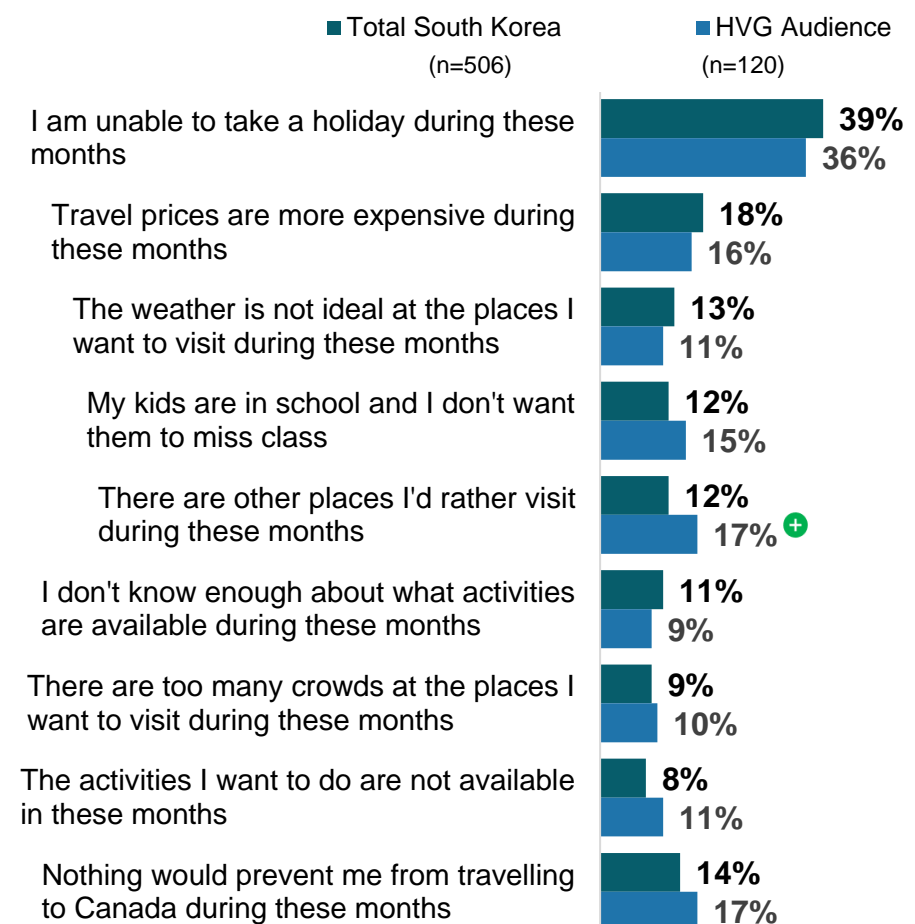
Motivators & Barriers for Fall Travel to Canada



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**?

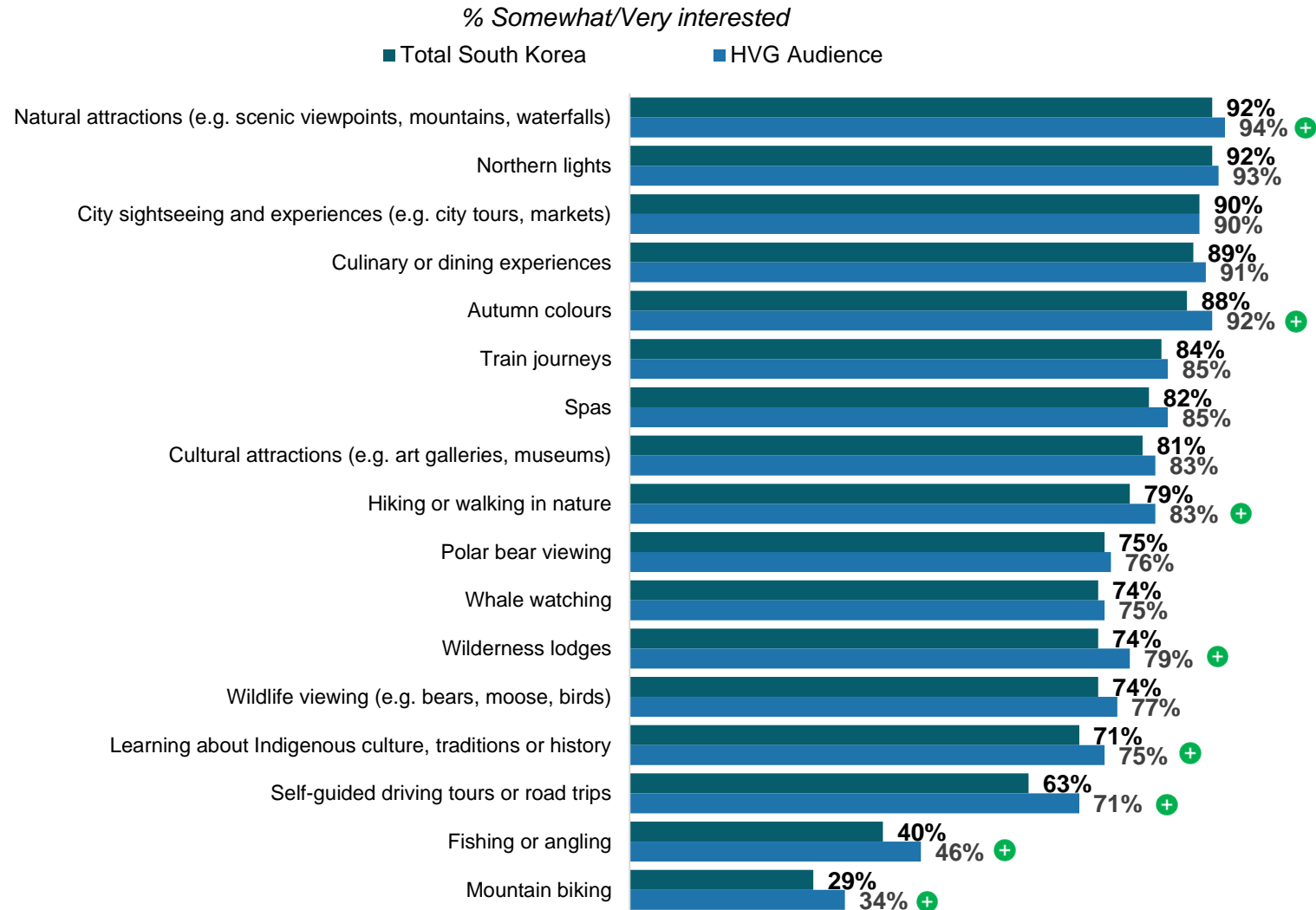
Base: Those in the dream to purchase stages of the path to purchase for Canada and not considering visiting Canada or any province/territory in September, October or November E7. You indicated earlier that you are not considering taking a holiday to **Canada** during the months of September, October 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

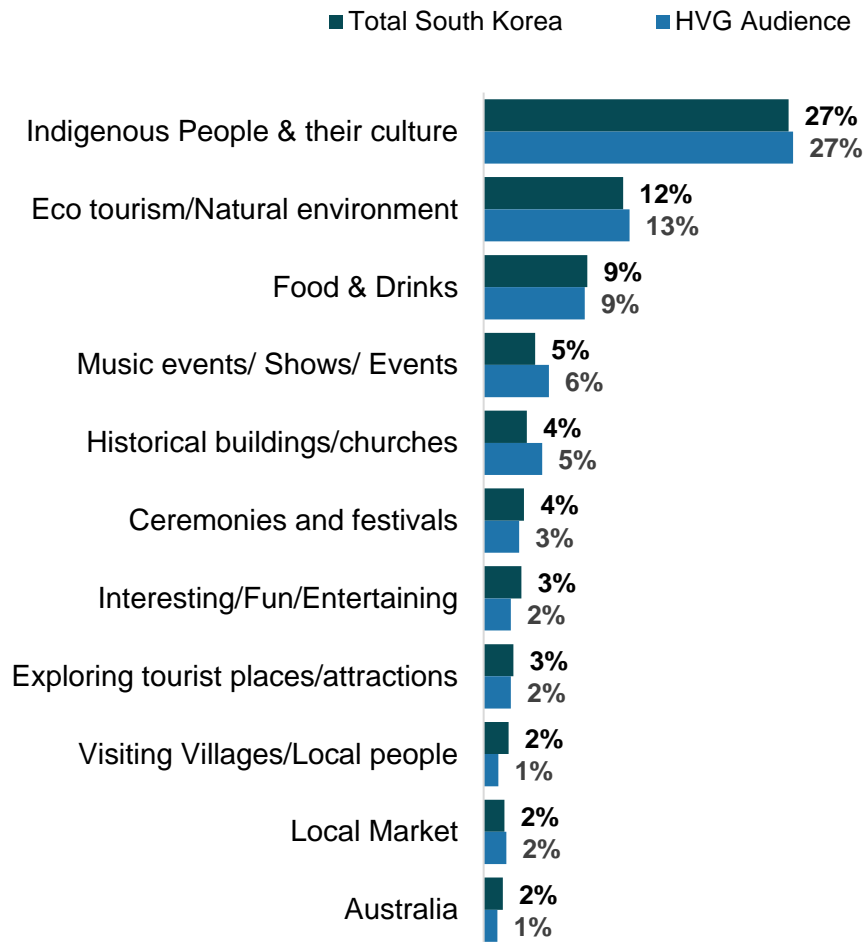




Indigenous Tourism



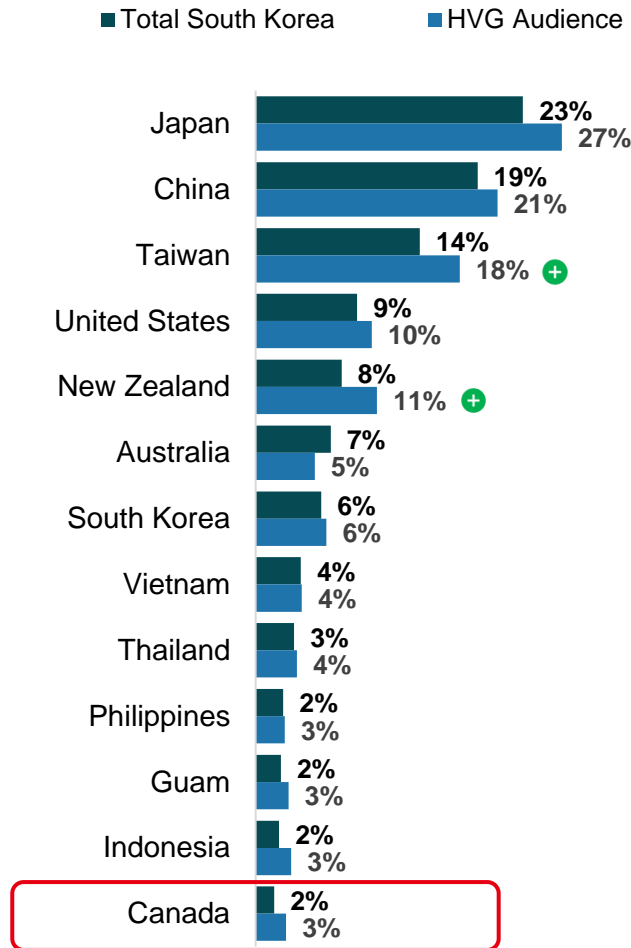
Unaided Mentions – Indigenous Cultural & Tourism Activities



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.

Unaided Indigenous Tourism Destinations



Indigenous Peoples Description

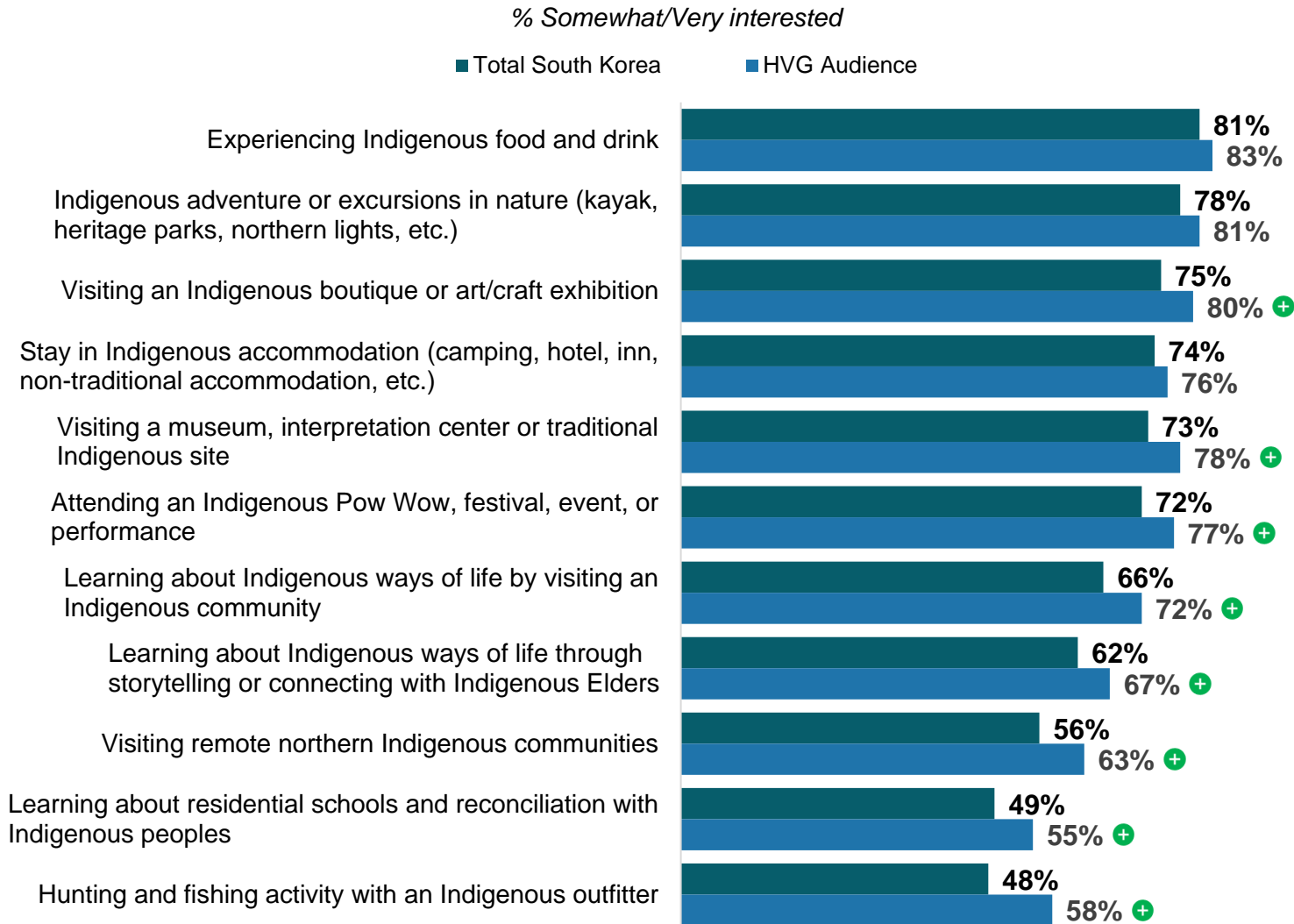
Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated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

65 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603); HVG (n=439)
 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).) [DESCRIPTION] Please note: You do not have to limit your responses to destinations you are considering for a holiday trip.

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



Interest in Indigenous Cultural & Tourism Activities



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.



Most Recent Trip

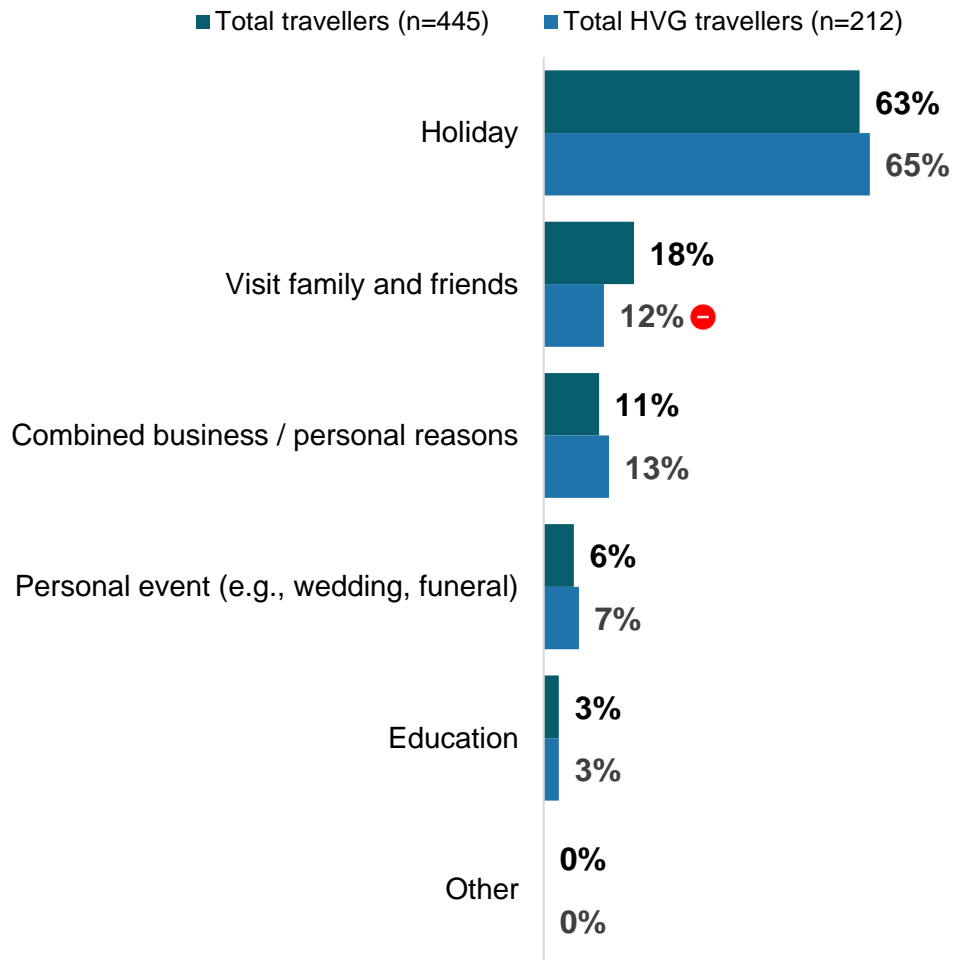


Lake Louise
Alberta

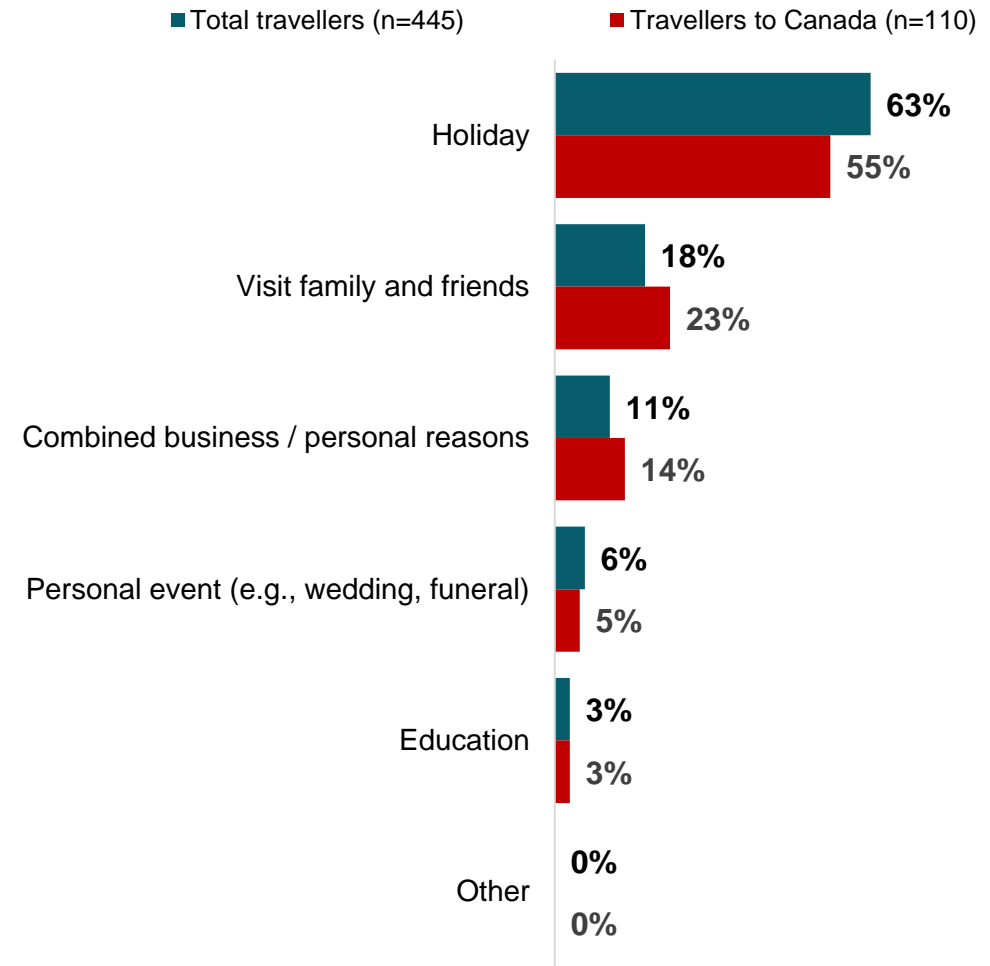


Main Purpose of Recent Trip

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



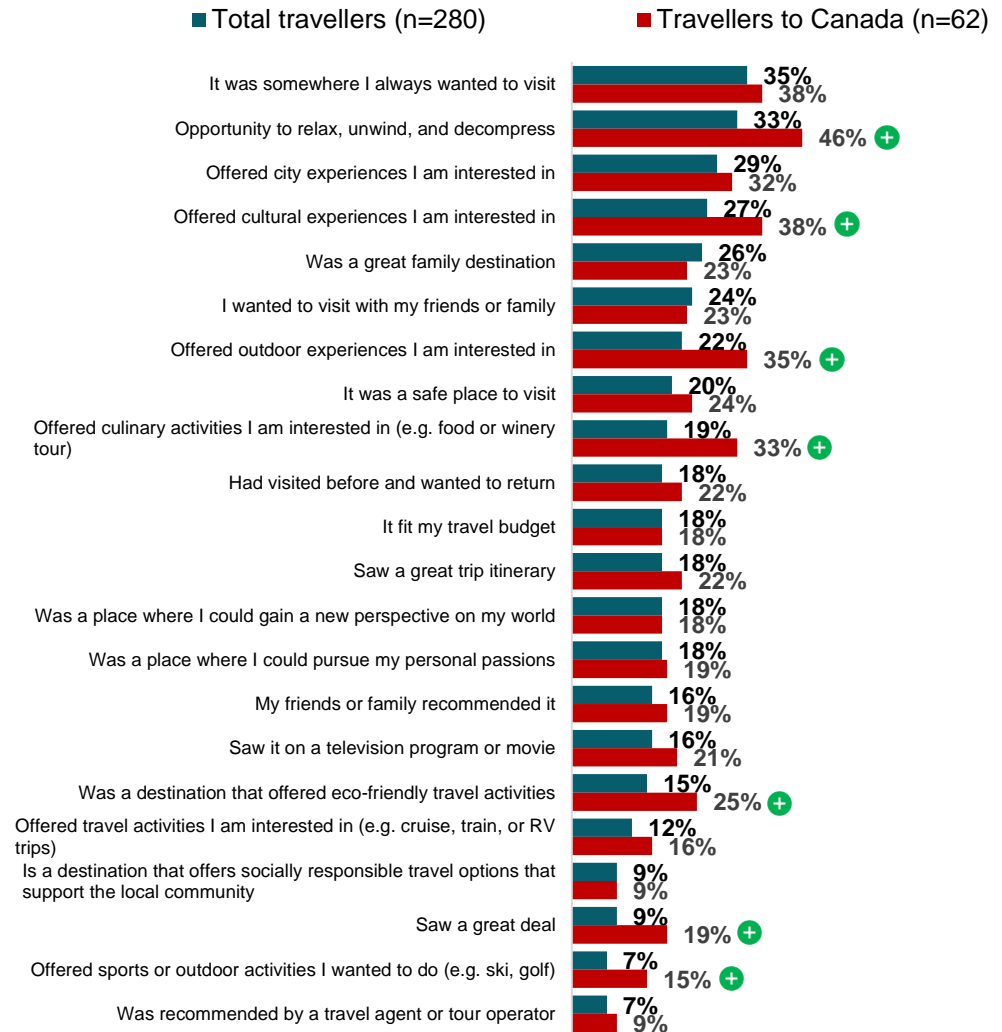
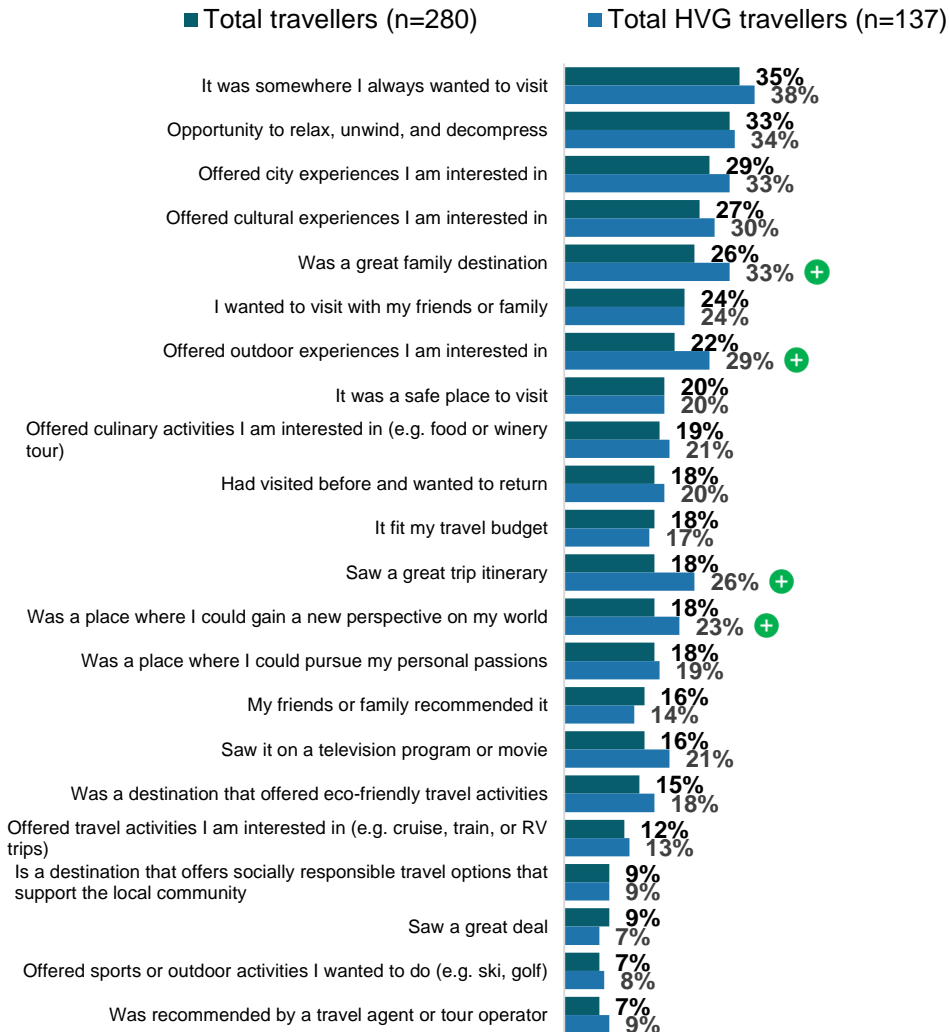
Total Travellers to Any Destination vs. Total Travellers to Canada



Factors in Choosing Destination for Recent Trip

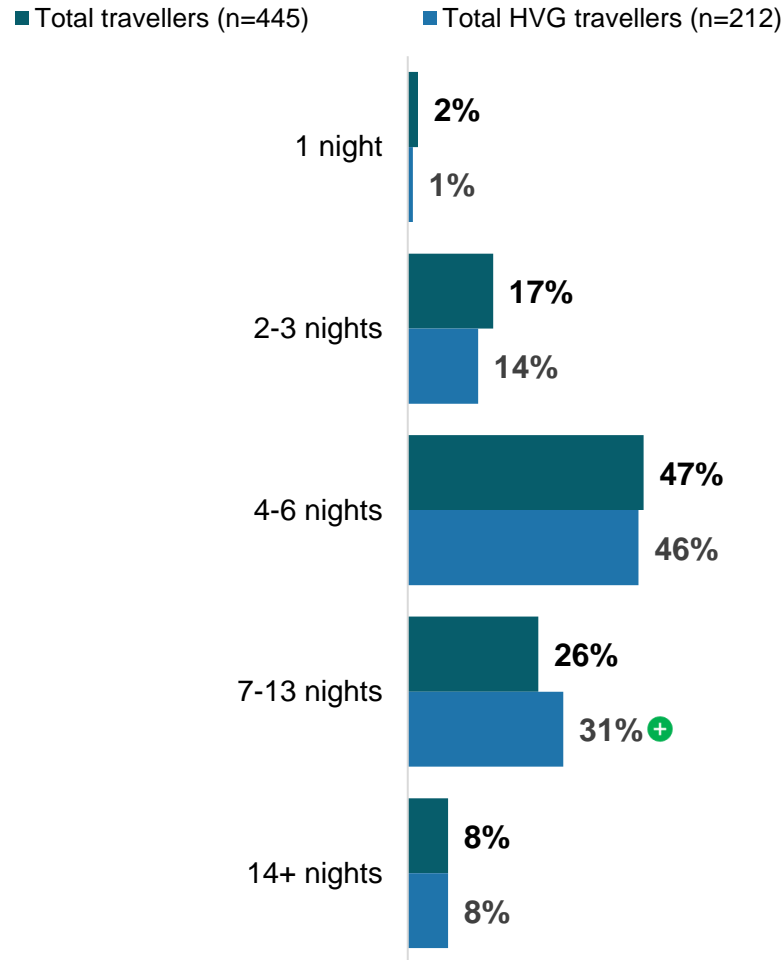
Total Travellers to Any Destination vs. HVG Travellers to Any Destination

Total Travellers to Any Destination vs. Total Travellers to Canada

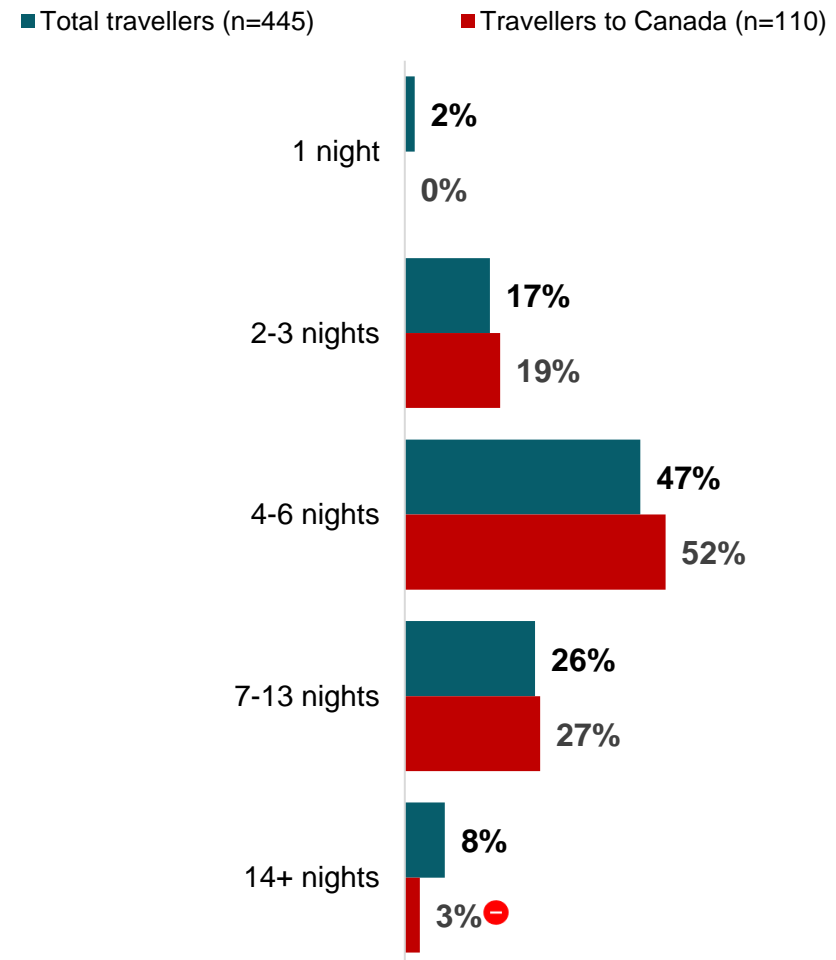


Nights Spent During Recent Trip

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

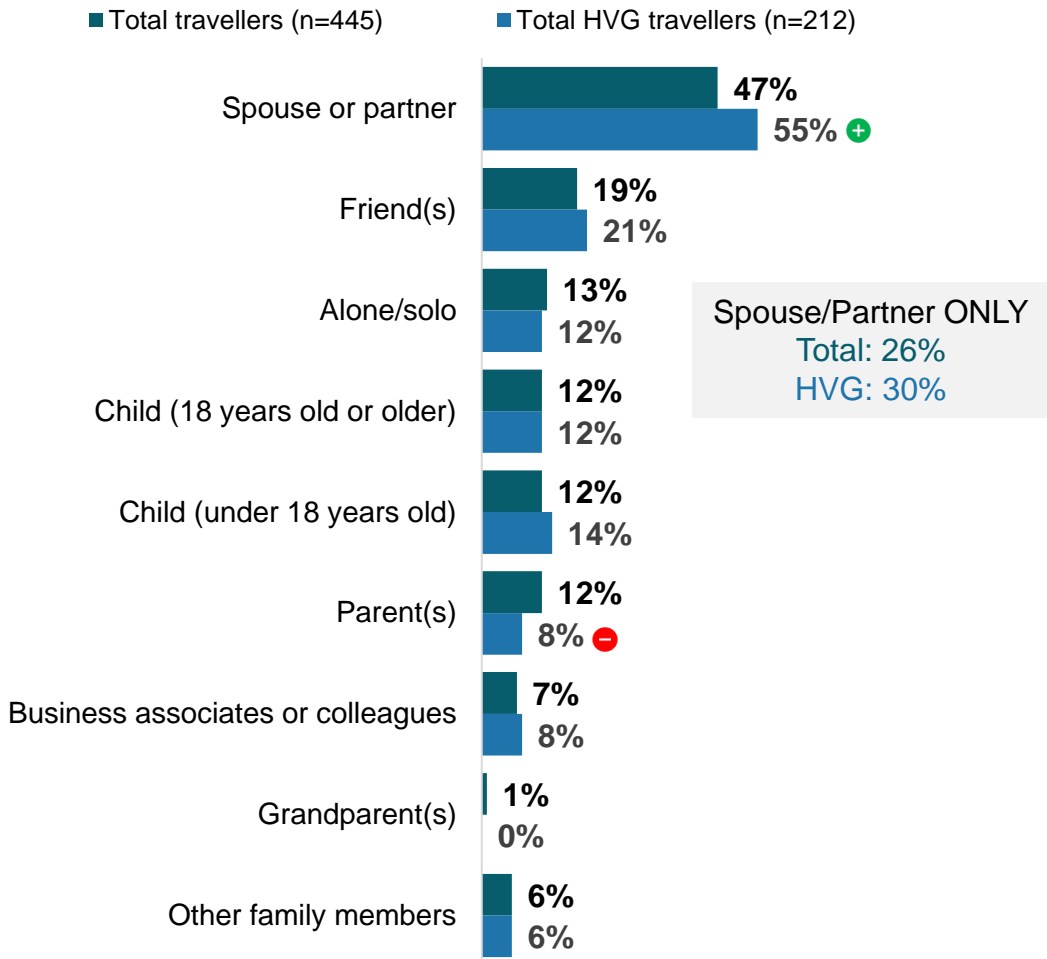


Total Travellers to Any Destination vs. Total Travellers to Canada

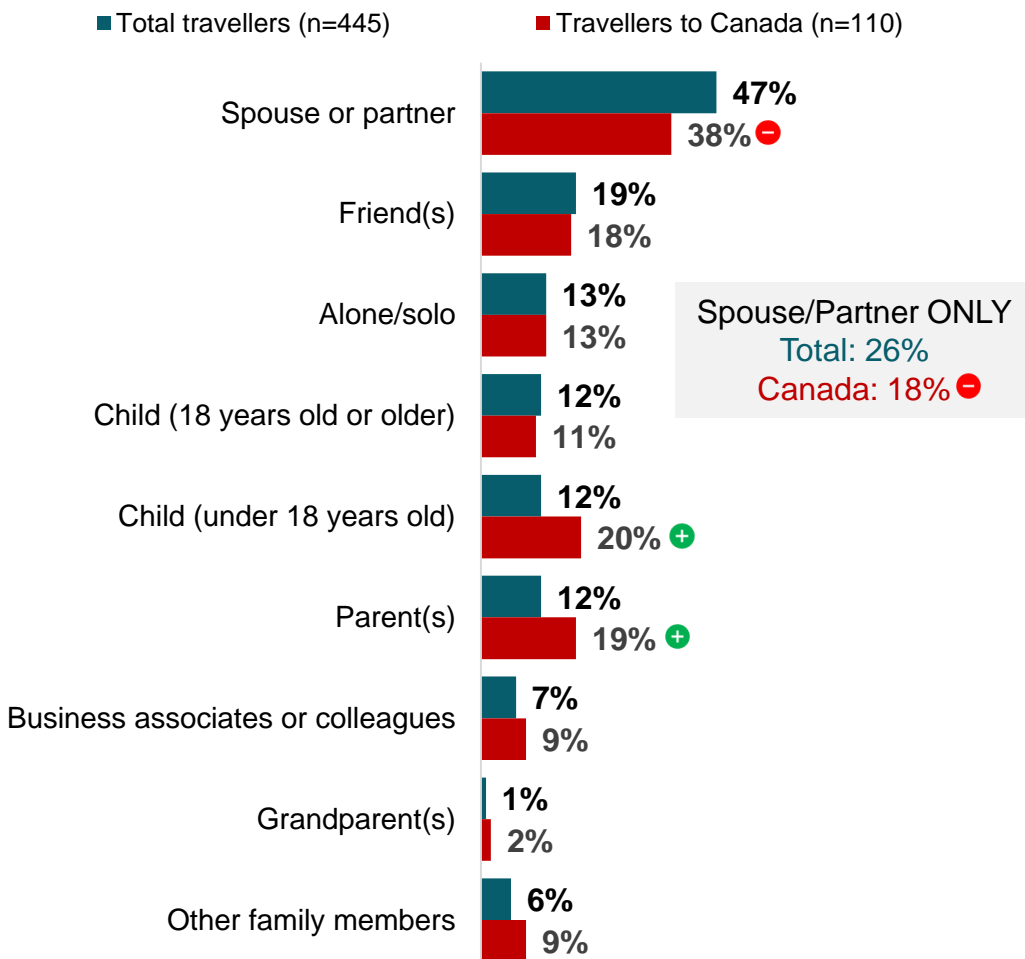


Travel Party of Recent Trip

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

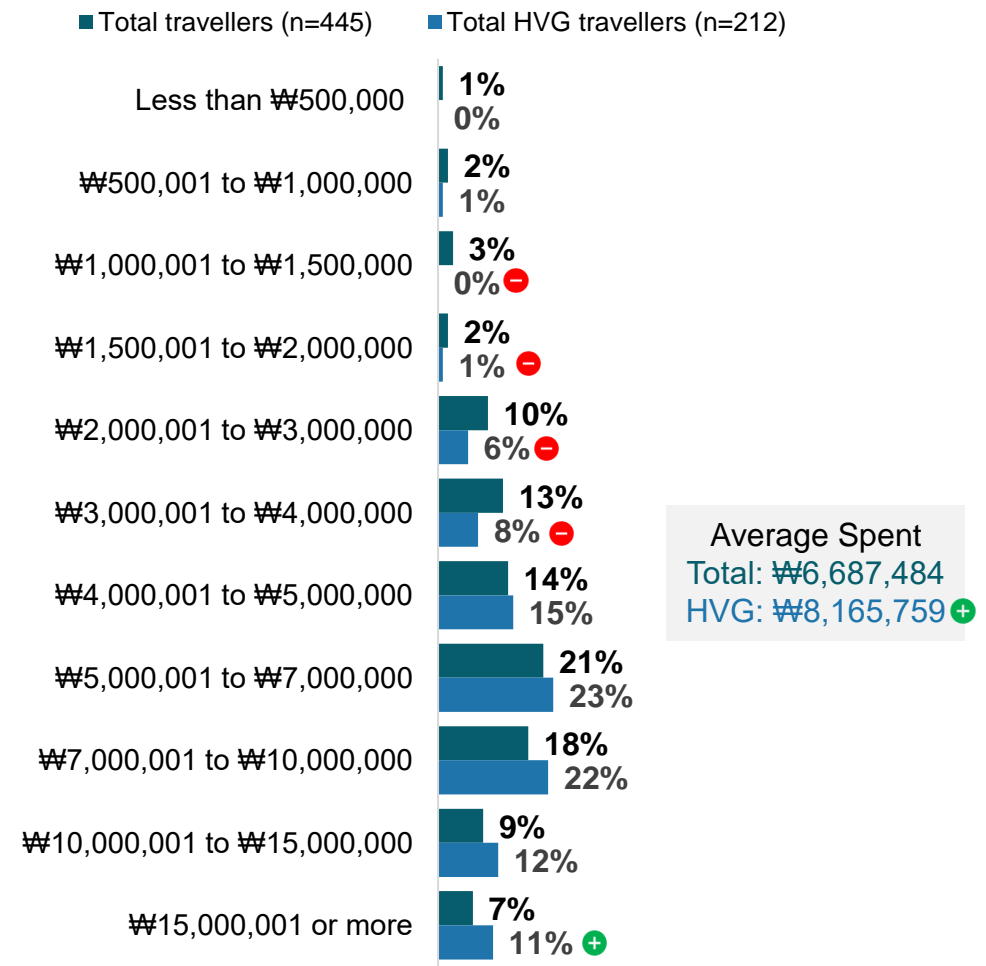


Total Travellers to Any Destination vs. Total Travellers to Canada

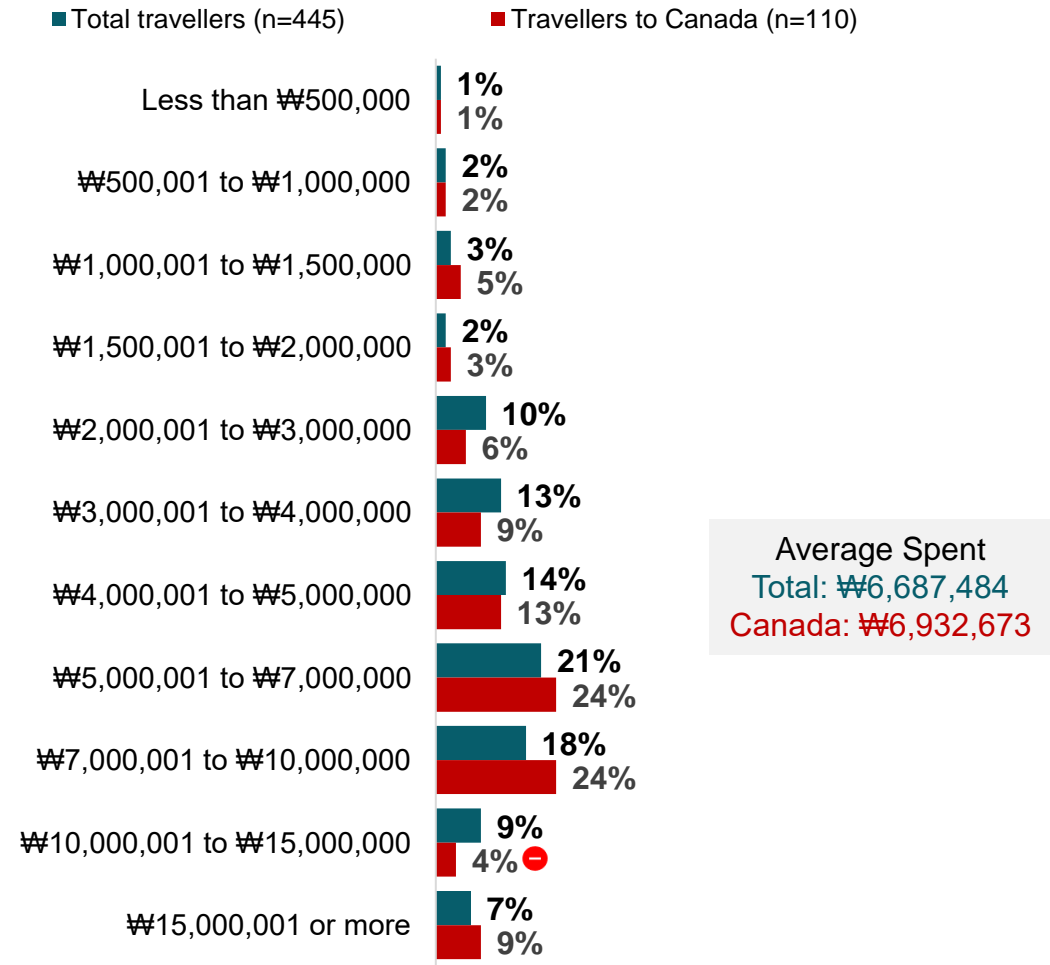


Amount Spent for Recent Trip

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



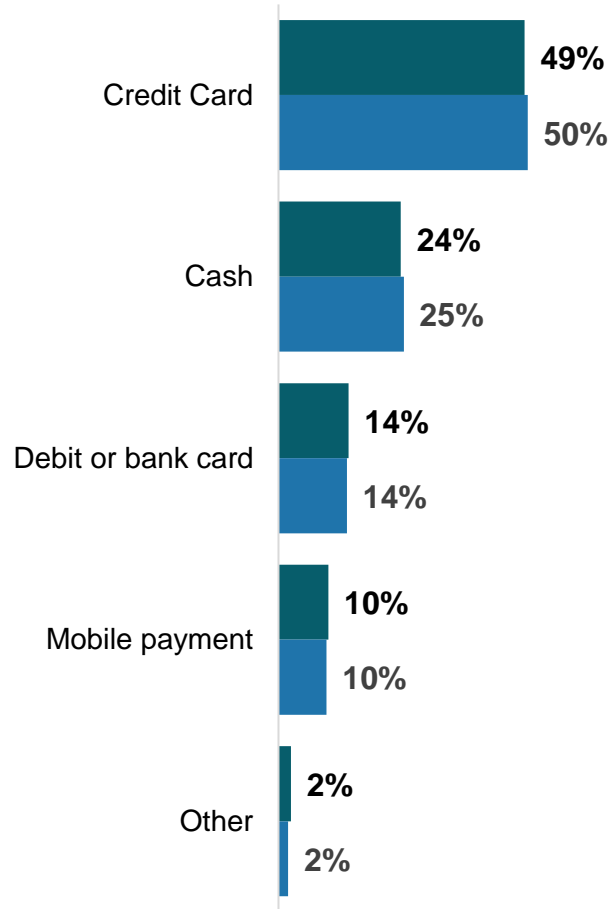
Total Travellers to Any Destination vs. Total Travellers to Canada



Payment Methods for Recent Trip

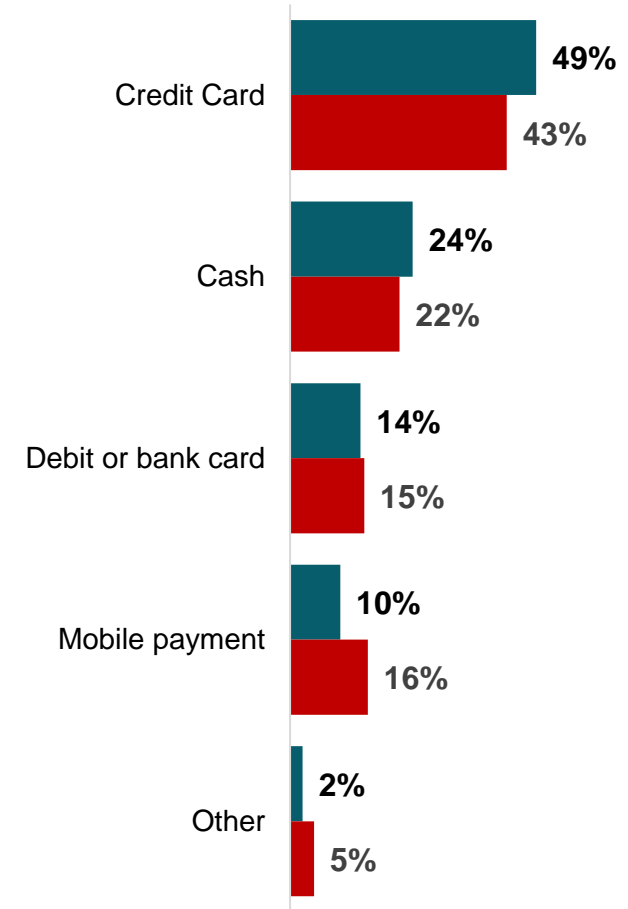
Total Travellers to Any Destination vs. HVG Travellers to Any Destination

■ Total travellers (n=445) ■ Total HVG travellers (n=212)



Total Travellers to Any Destination vs. Total Travellers to Canada

■ Total travellers (n=445) ■ Travellers to Canada (n=110)

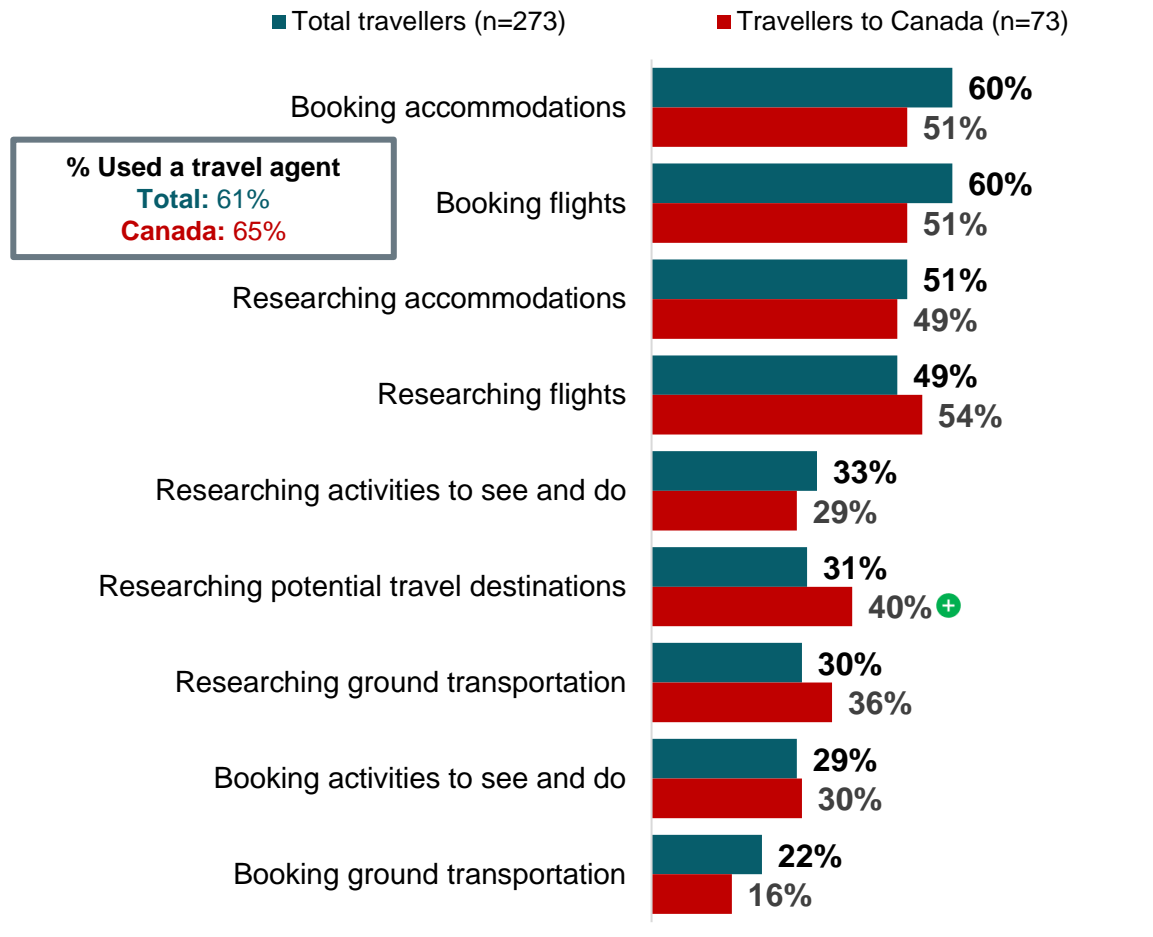
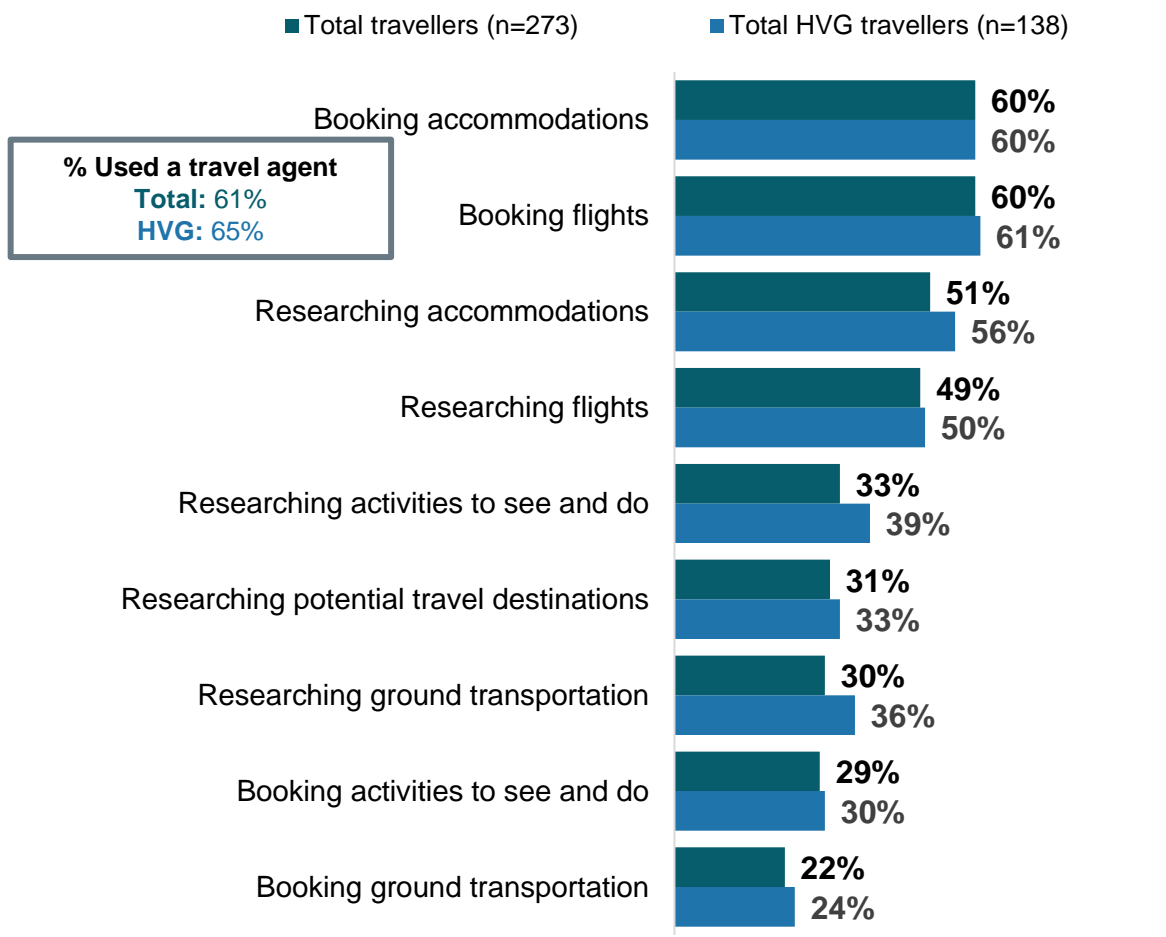


Travel Agents/Tour Operator Usage For Recent Trip



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

Total Travellers to Any Destination vs. Total Travellers to Canada



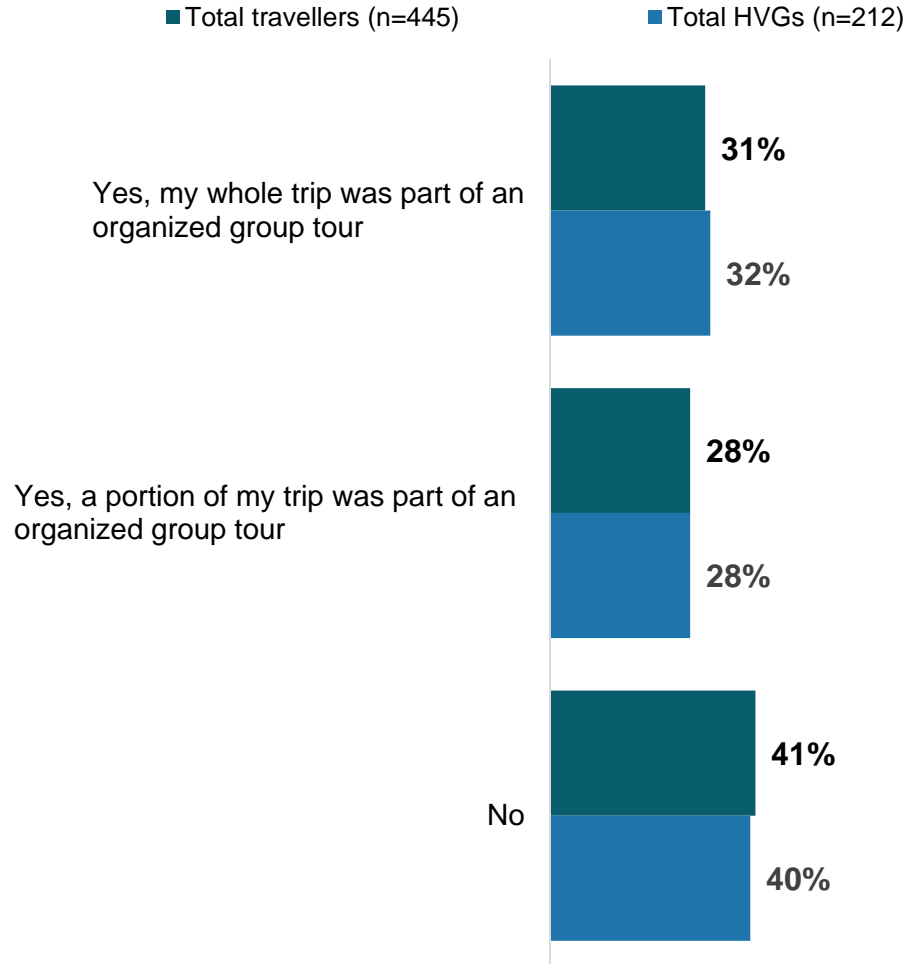
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination, Used a Travel Agent/Tour Operator (n=273); HVG (n=138); Travellers to Canada (n=73)

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?

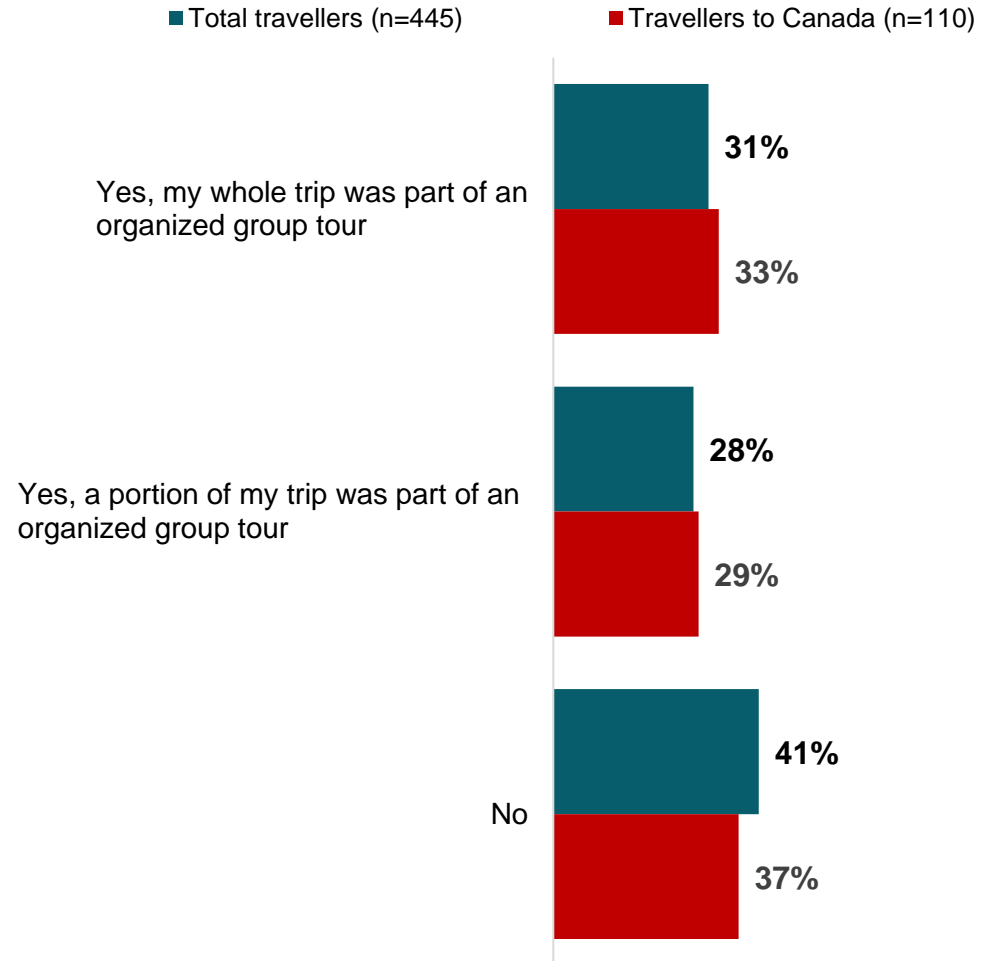


Organized Group Tour Usage For Recent Trip

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

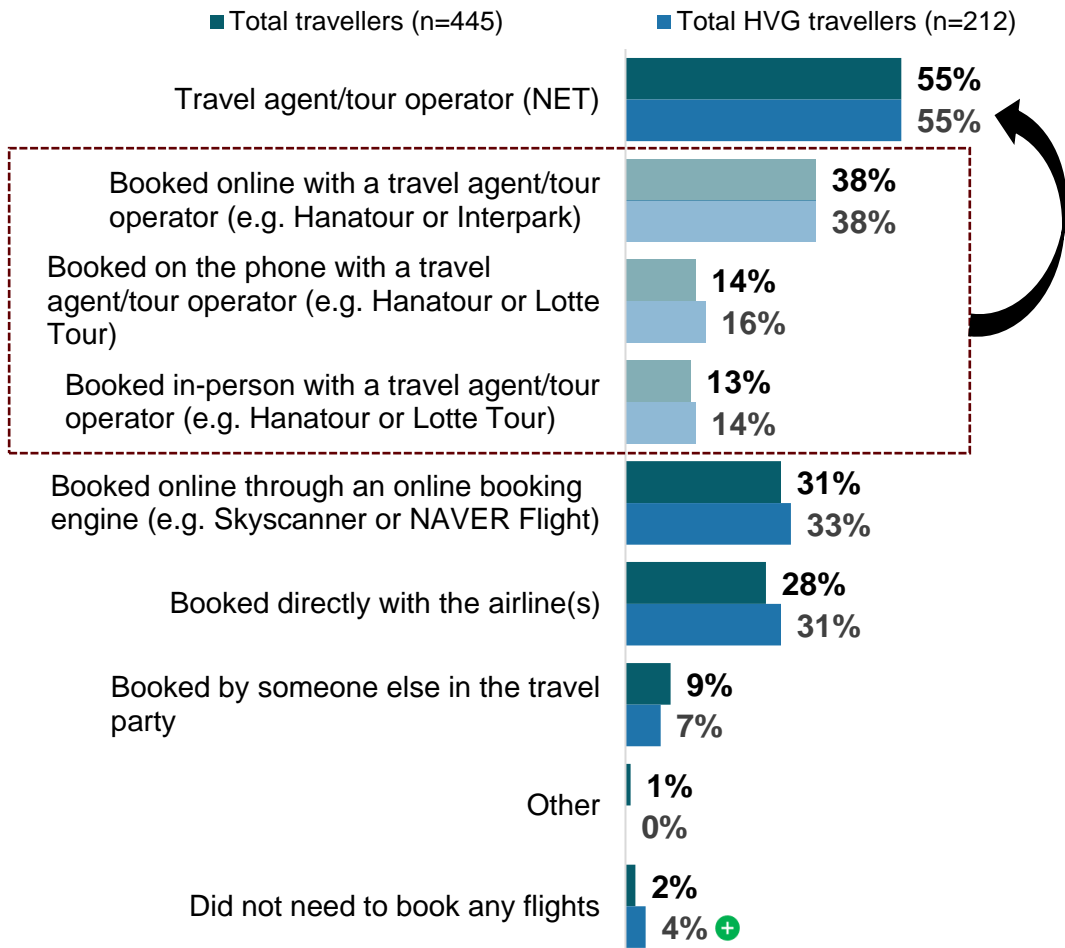


Total Travellers to Any Destination vs. Total Travellers to Canada

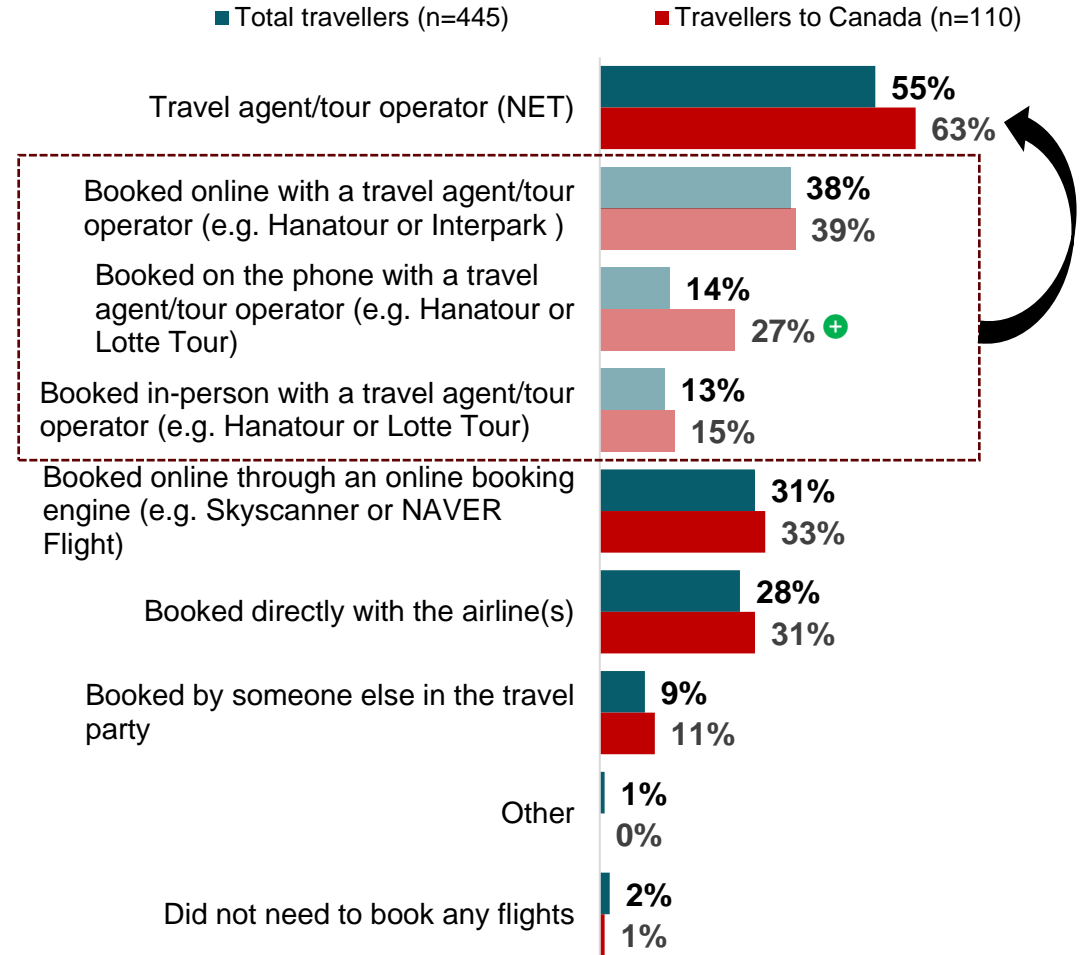


Booking Flights For Recent Trip

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

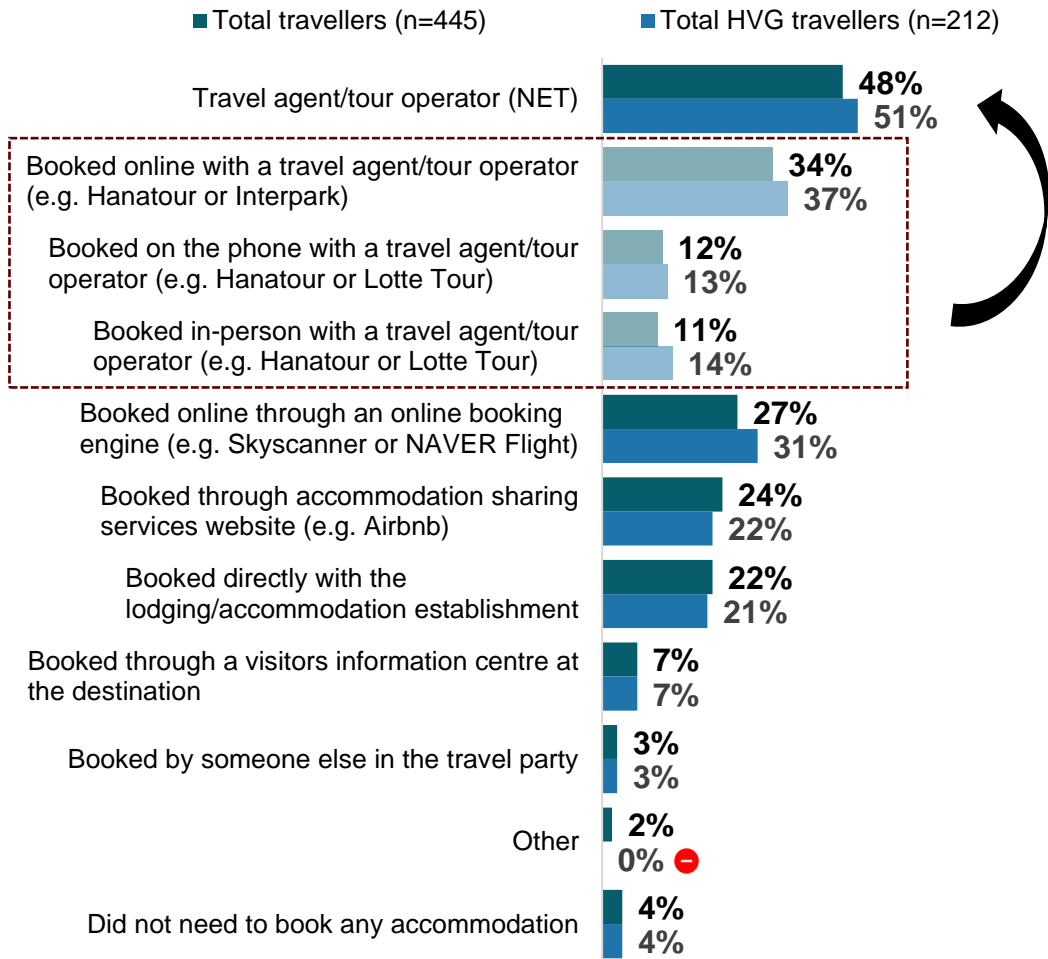


Total Travellers to Any Destination vs. Total Travellers to Canada

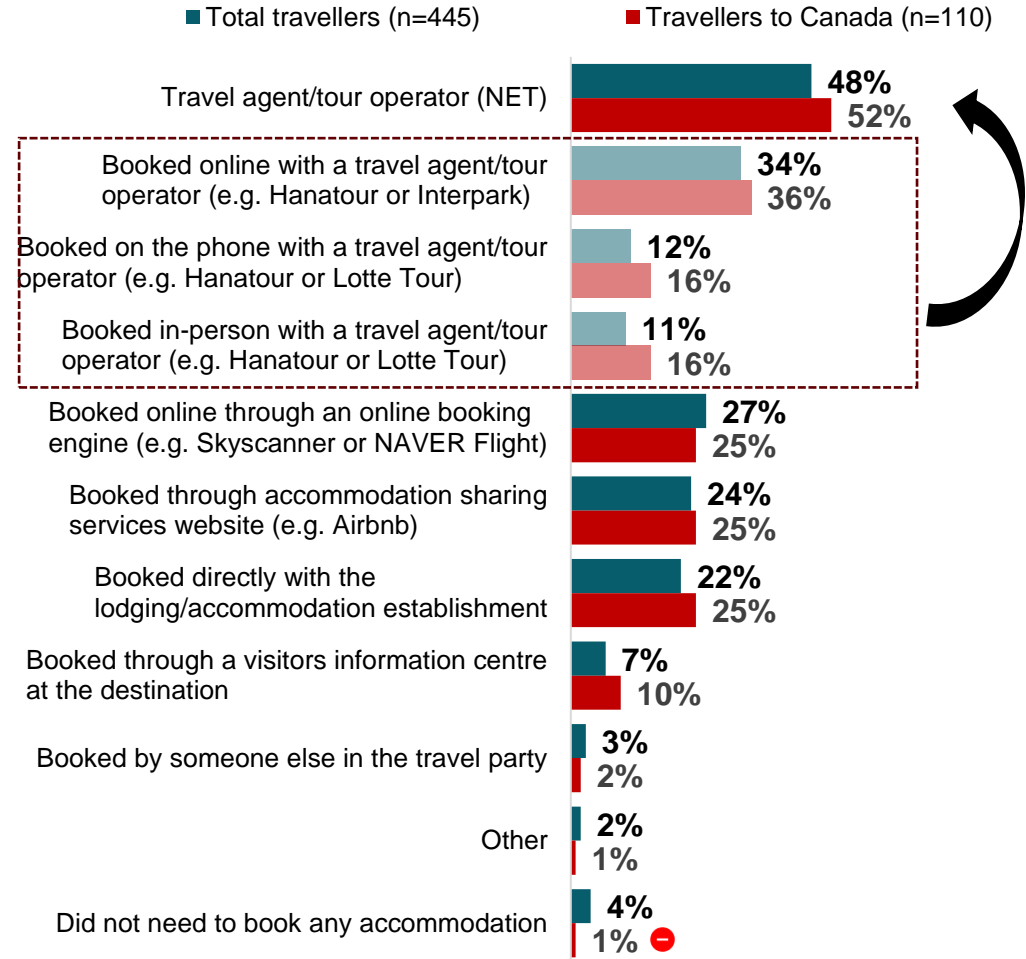


Booking Accommodations For Recent Trip

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



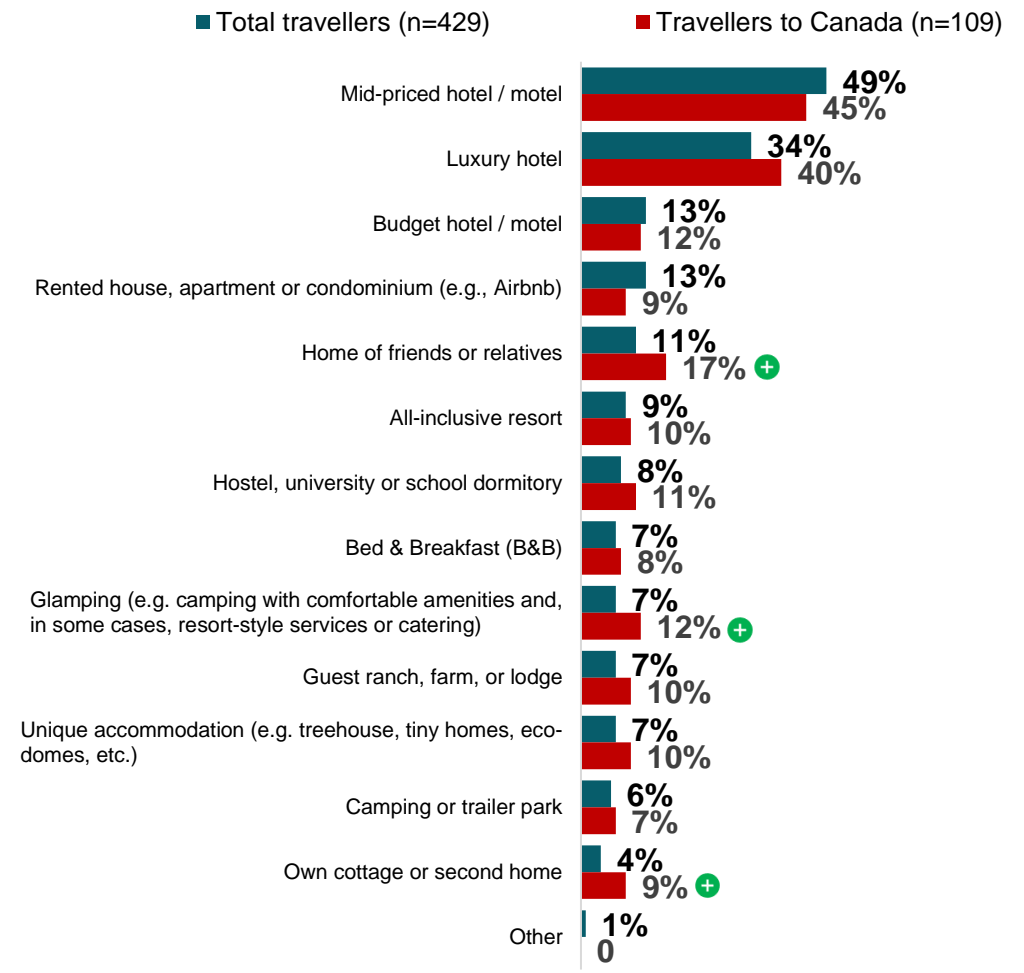
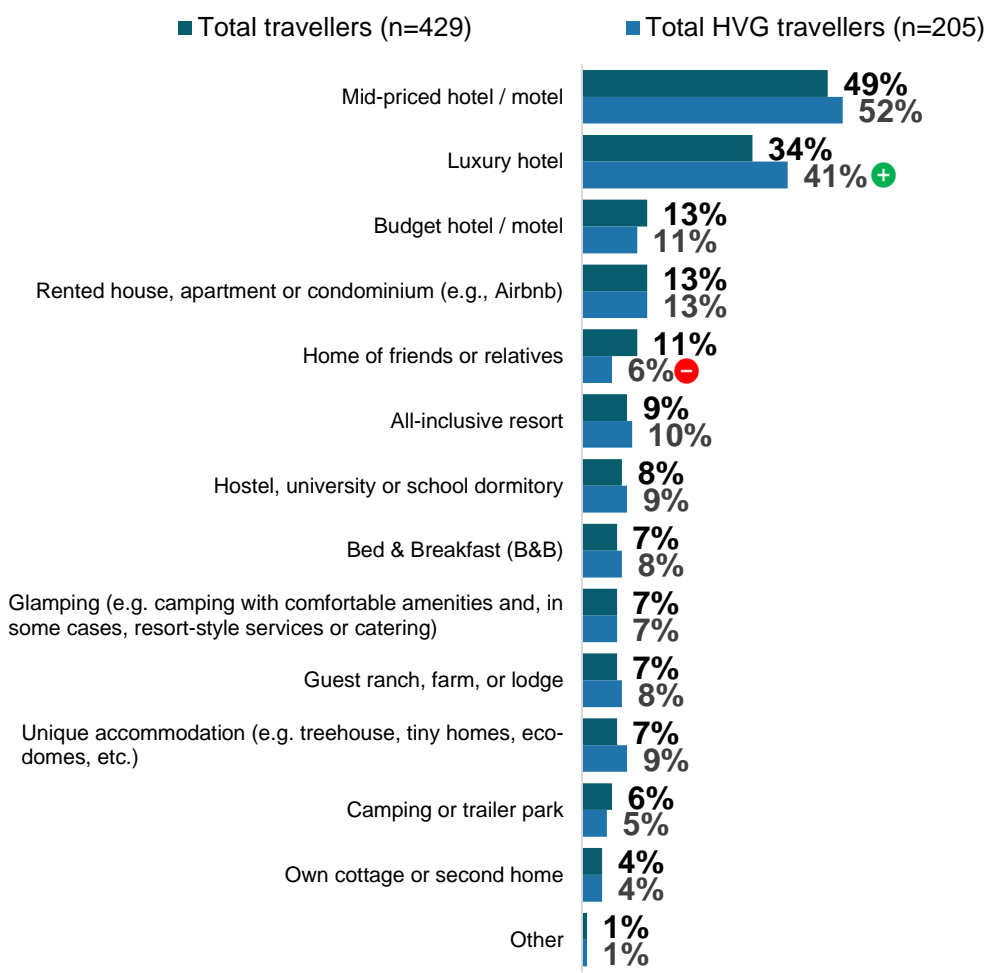
Total Travellers to Any Destination vs. Total Travellers to Canada



Type of Accommodations For Recent Trip

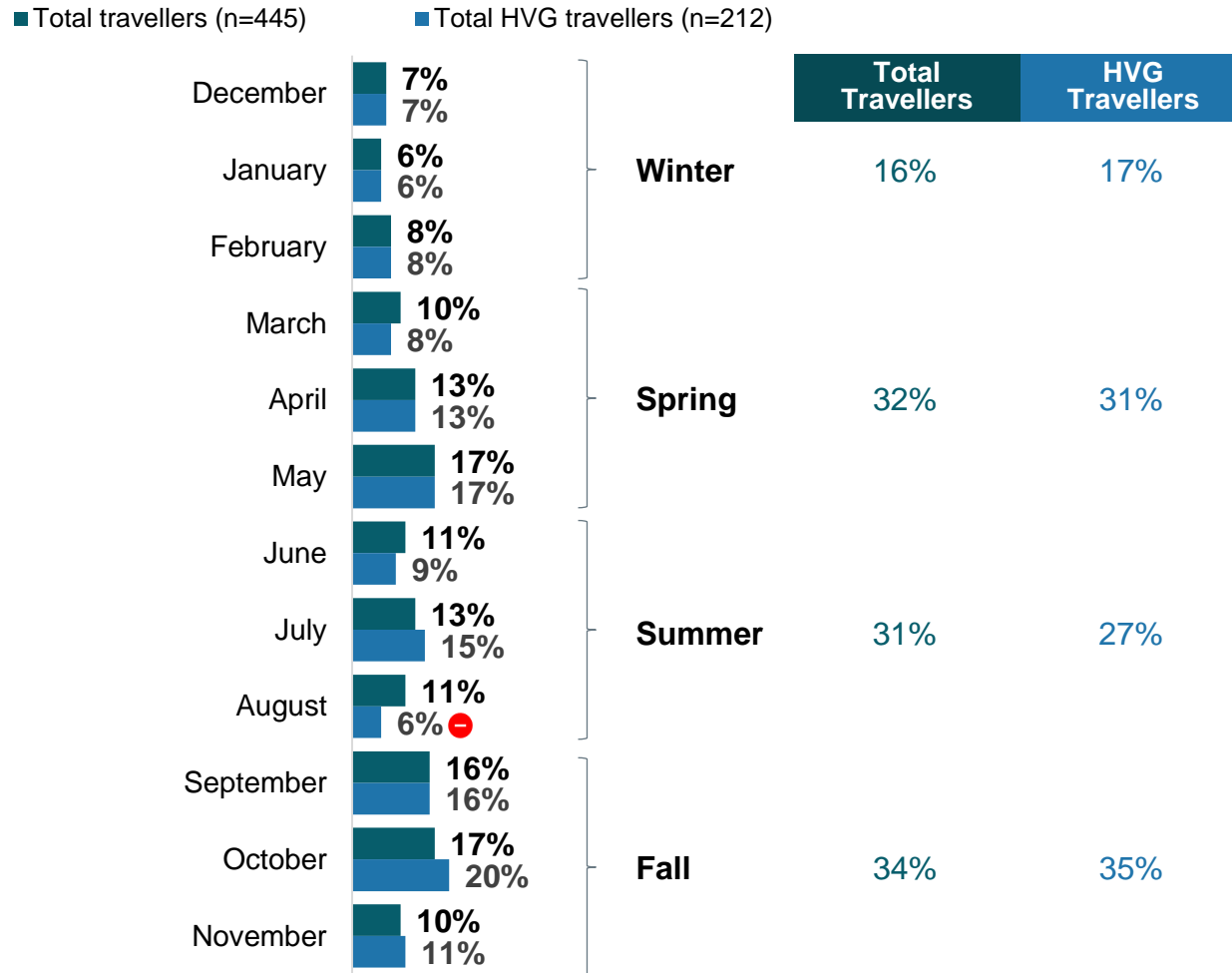
Total Travellers to Any Destination vs. HVG Travellers to Any Destination

Total Travellers to Any Destination vs. Total Travellers to Canada

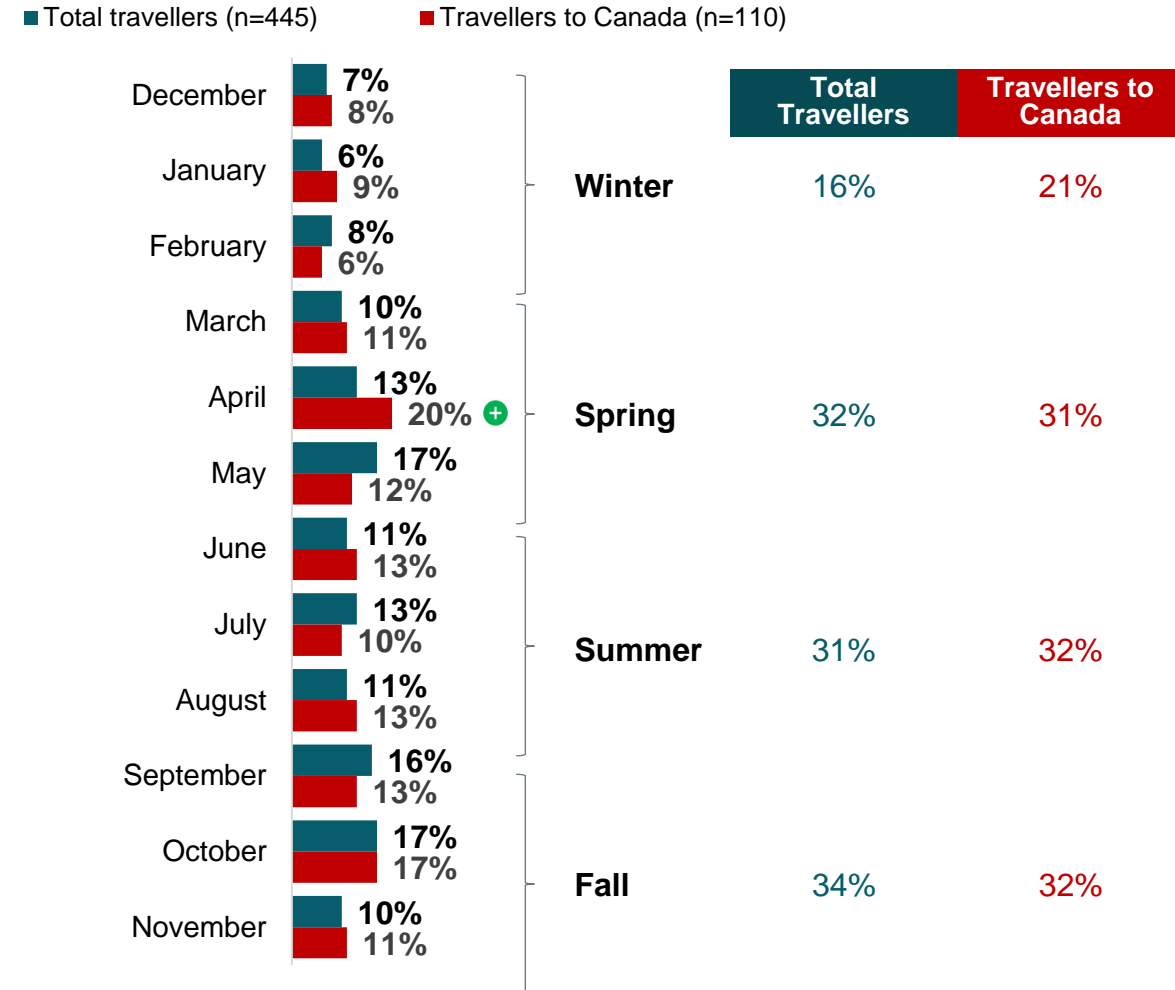


Time of Year Travelled For Recent Trip

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



Total Travellers to Any Destination vs. Total Travellers to Canada





Most Recent Trip to Canada



 Niagara Falls
Ontario



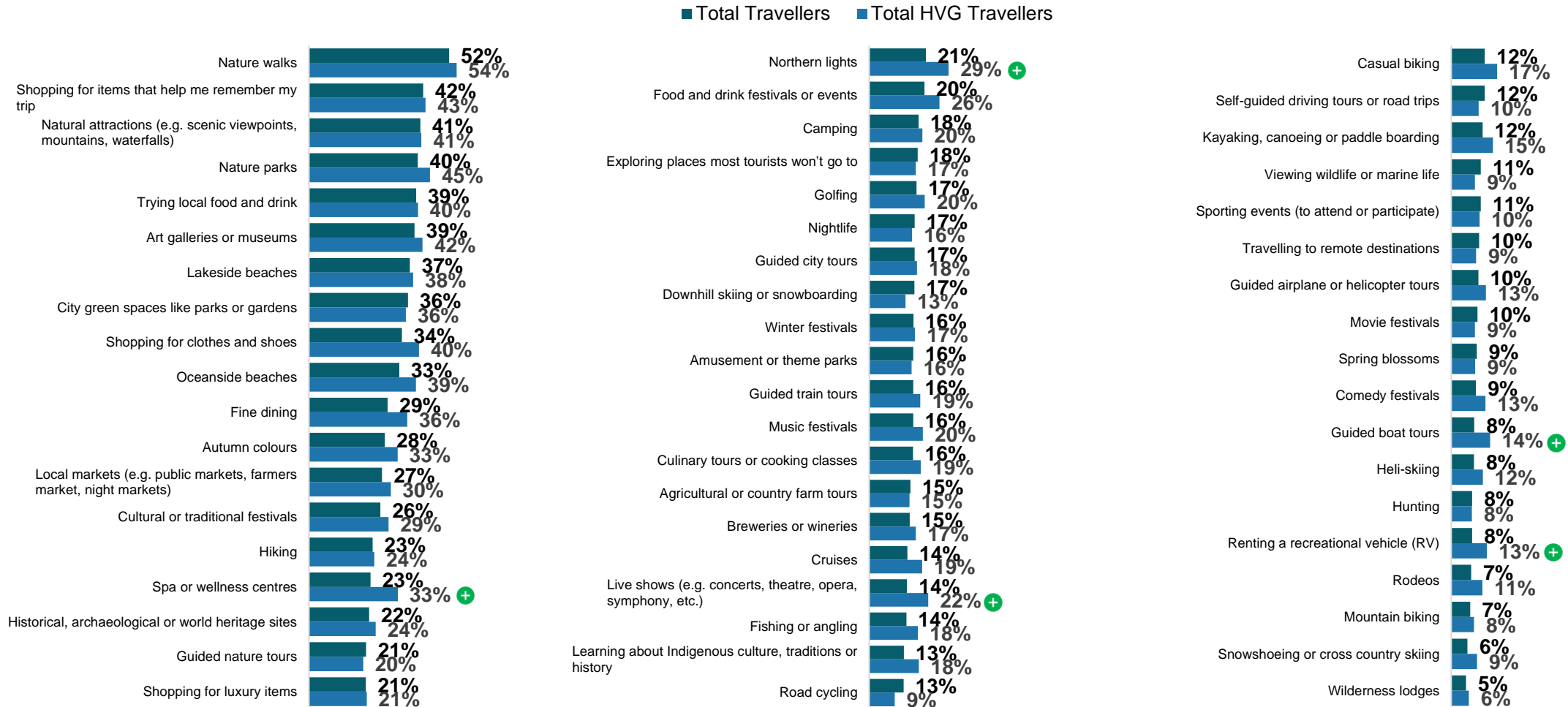
Top 10 Activities Participated in During Recent Trip to Canada



Total Travellers (n=110)	Total HVG Travellers (n=60)
Nature walks	Nature walks
Shopping for items that help me remember my trip	Nature parks
Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)	Shopping for items that help me remember my trip
Nature parks	Art galleries or museums
Trying local food and drink	Natural attractions (e.g. scenic viewpoints, mountains, waterfalls)
Art galleries or museums	Shopping for clothes and shoes
Lakeside beaches	Trying local food and drink
City green spaces like parks or gardens	Oceanside beaches
Shopping for clothes and shoes	Lakeside beaches
Oceanside beaches	Fine dining



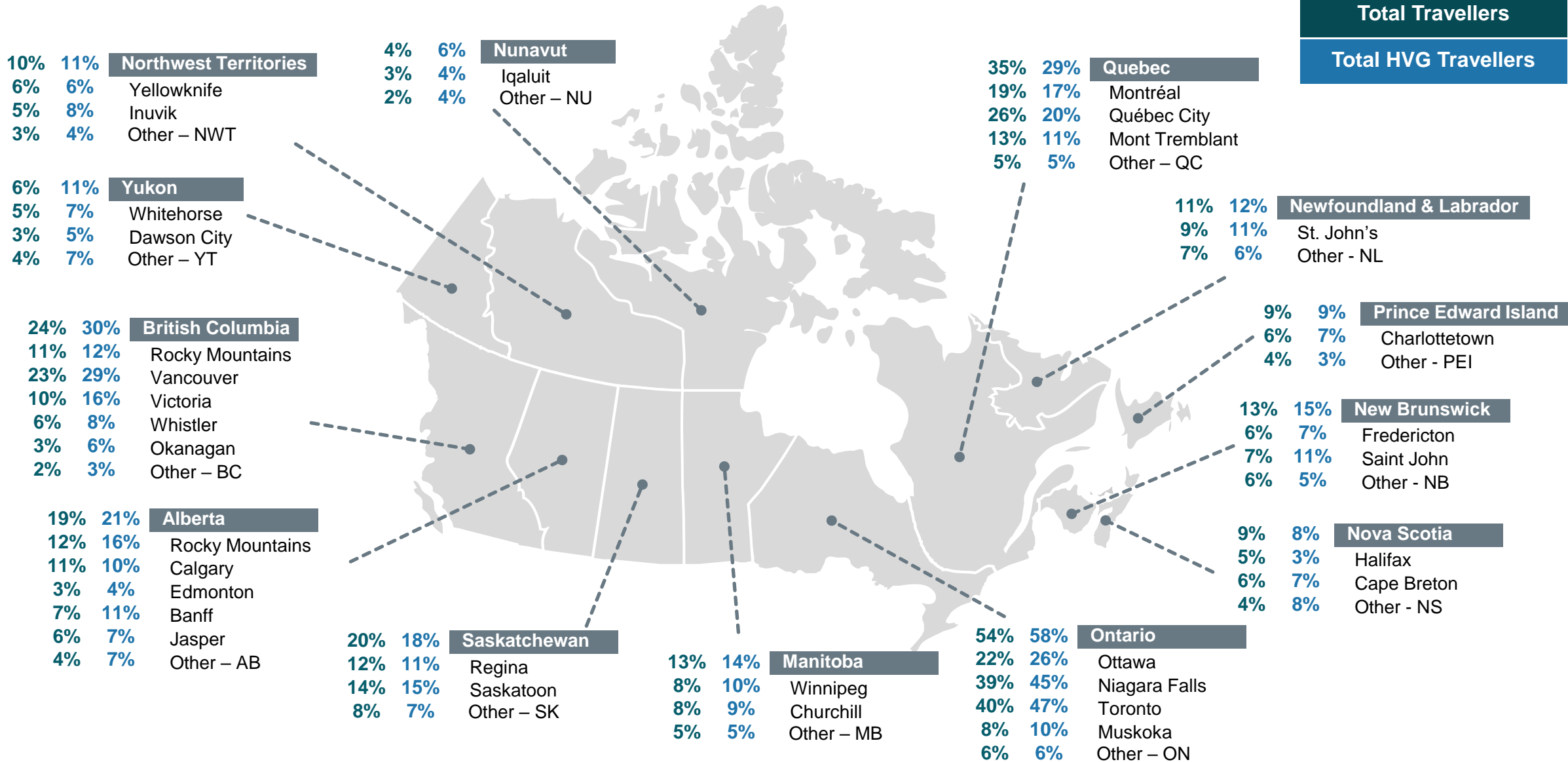
Activities Participated in During Recent Trip to Canada



Canadian Destinations Visited During Recent Trip

Total Travellers

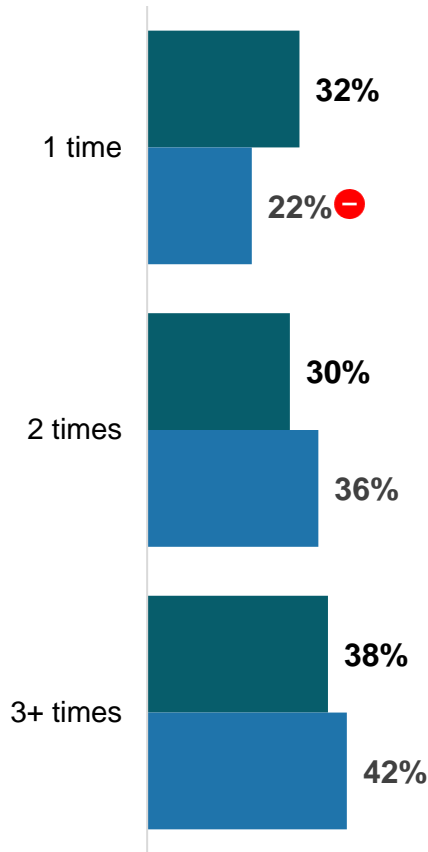
Total HVG Travellers



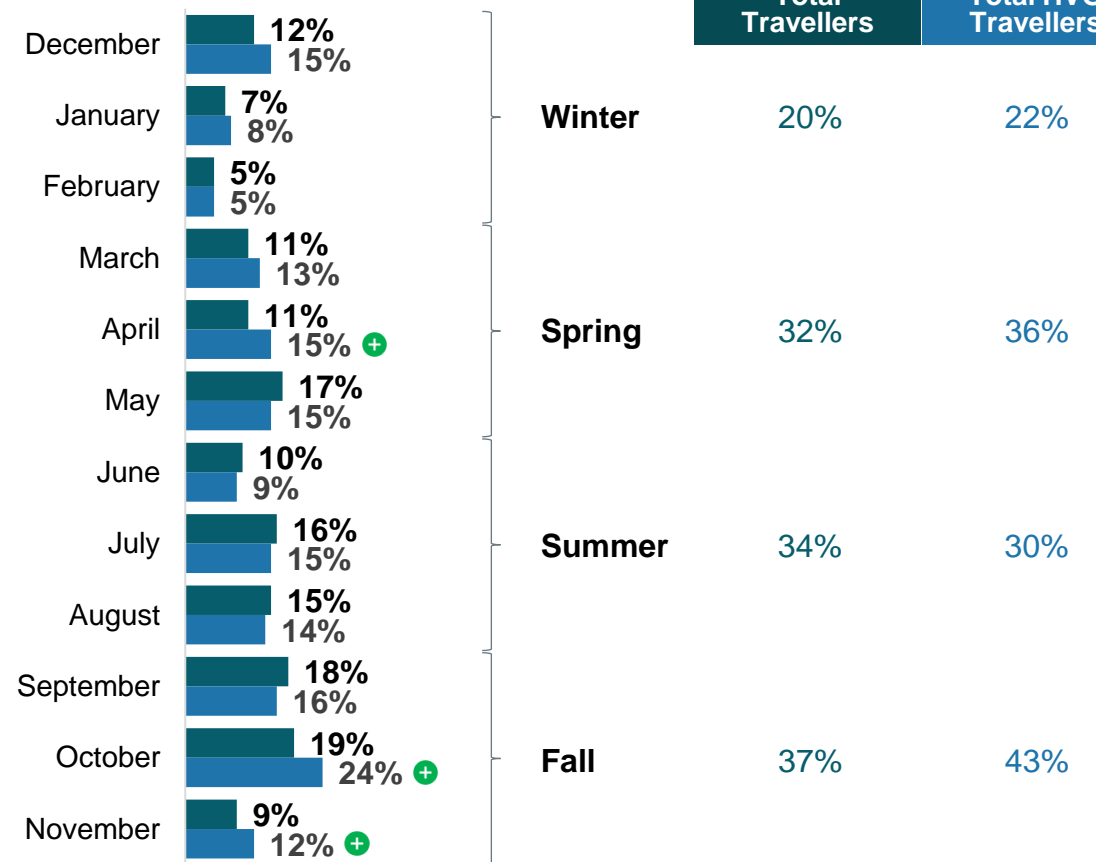
Number of Visits Ever & Time of Year Visited Canada



■ Total Travellers ■ Total HVG Travellers



■ Total Travellers ■ Total HVG Travellers



Demographics

	All Long-haul Travellers (n=1603)	HVG Audience (n=439)
Gender		
Male	44%	49% +
Female	56%	51% -
Age		
18 to 34	35%	31%
35 to 54	33%	34%
55 or older	33%	35%
Children in household under the age of 18		
Yes	34%	43% +
Employed		
Yes	74%	79% +
Household Income (Monthly)		
Under 3.5M won	21%	2% -
3.5M won to 4.5M won	11%	2% -
4.5M won to 6M won	21%	2% -
6M won or more	45%	95% +



THANK YOU

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



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