

2023 GLOBAL TRAVELLER RESEARCH PROGRAM

SOUTH KOREA HIGHLIGHTS REPORT



Canada



St. John's

Newfoundland & Labrador



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STUDY OVERVIEW: SOUTH KOREA MARKET

Target Population

The target population are residents who are aged 18 years or more, who have taken a long-haul pleasure holiday and stayed at least four nights in a paid accommodation in the last three years or are thinking about doing so in the next two years.

Timing of fieldwork

December 4th-15th 2023

Geographical Definition for Qualified Trips

Qualified trips refer to trips taken outside of East Asia (e.g., China, Hong Kong, Macau, Japan, South Korea and Taiwan)

To note:

In 2023, DC switched research providers to YouGov Canada, with the research program evolving from the previous Global Travel Watch (GTW) to the new Global Traveller Research Program (GTRP). As a result, no trending is available for the South Korean market.

Key Insights



Over the next two years, Canada is projected to attract 8.2 million visitors, leveraging a robust traveller base despite relatively low consideration levels



Canada attracts more visitors during the Summer and Fall months



South Korean travellers tend to focus their trips around local cuisine, nature walks, and natural attractions



In the last three years, most travellers to Canada visited with their spouse or partner



With regards to Indigenous experience, South Korean travellers interested in Canada are keen on Indigenous culinary adventures, nature, and arts and crafts exploration

MARKET SIZING



Kyle
Saskatchewan



LONG-HAUL PLEASURE TRAVELLER SIZING



Total population aged 18 years or more¹

44,644,000

X

Incidence rate: Total long-haul pleasure travel incidence (past 3 years/planned next 2 years)¹

48.5%

=



Size of the Long-haul Pleasure Traveller Target market

21,652,500

This study was conducted among long-haul pleasure travellers, represented by 21.7M Koreans aged 18 years or more.



Essipit
Québec

¹Source: Estimates 2023, Statistics Korea
Base: General population aged 18+ (n=987)
²Note: Results are from 2023 YouGov Canada Omnibus Survey



SIZE OF THE POTENTIAL MARKET TO CANADA (NEXT 2 YEARS)



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

21,652,500

X

Target Market for Canada

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

79.9%

=



Size of the target market

17,300,500

X

Immediate Potential for Canada

Will definitely/very likely visit Canada in the next 2 years¹

47.4%

=



Immediate potential

8,200,500

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)

7 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) Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

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

The next 2-year immediate potential for Canada is 8.2 million long-haul pleasure travellers.



Grand Manan Island
New Brunswick

South Korea GTRP –
December 2023

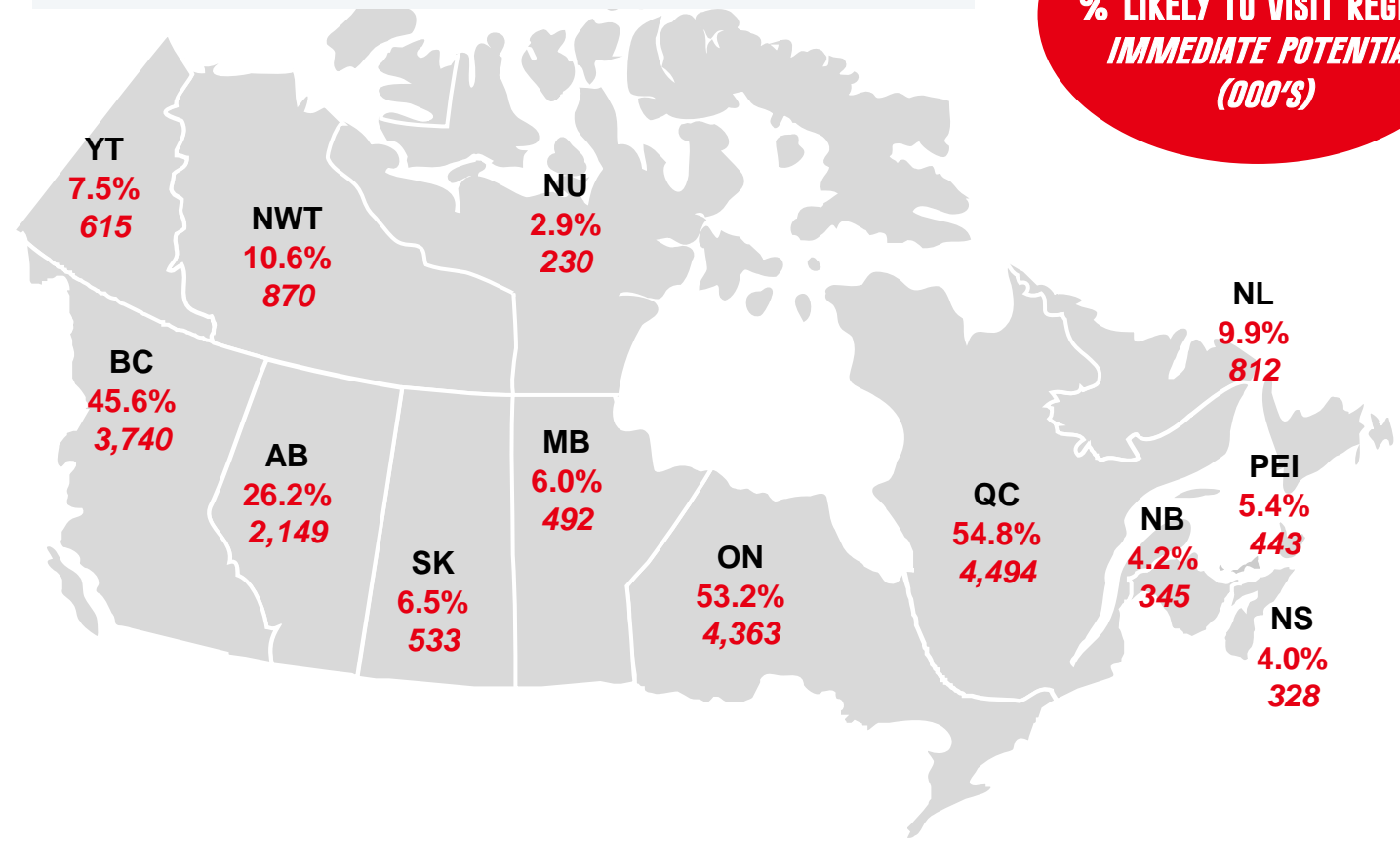


POTENTIAL MARKET SIZE FOR THE REGIONS

Québec and Ontario each have the potential to draw in over 4 million Korean travellers over the next 2 years.

IMMEDIATE POTENTIAL FOR CANADA: 8,200,500

KEY
% LIKELY TO VISIT REGION
IMMEDIATE POTENTIAL
(000'S)



Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1279)
If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)

TRAVEL BEHAVIOURS



Whitehorse
Yukon



TOP 10 GENERAL ACTIVITIES INTERESTED IN

69%

Nature Walks

48%

Nature Parks

60%

Trying Local Food and Drink

43%

City Green Spaces Like Parks or Gardens

53%

Oceanside Beaches

42%

Art Galleries or Museums

52%

Natural Attractions

40%

Food and Drink Festivals or Events

48%

Local Markets

40%

Spring Blossoms



Korean travellers are most interested in going on nature walks and trying local food.

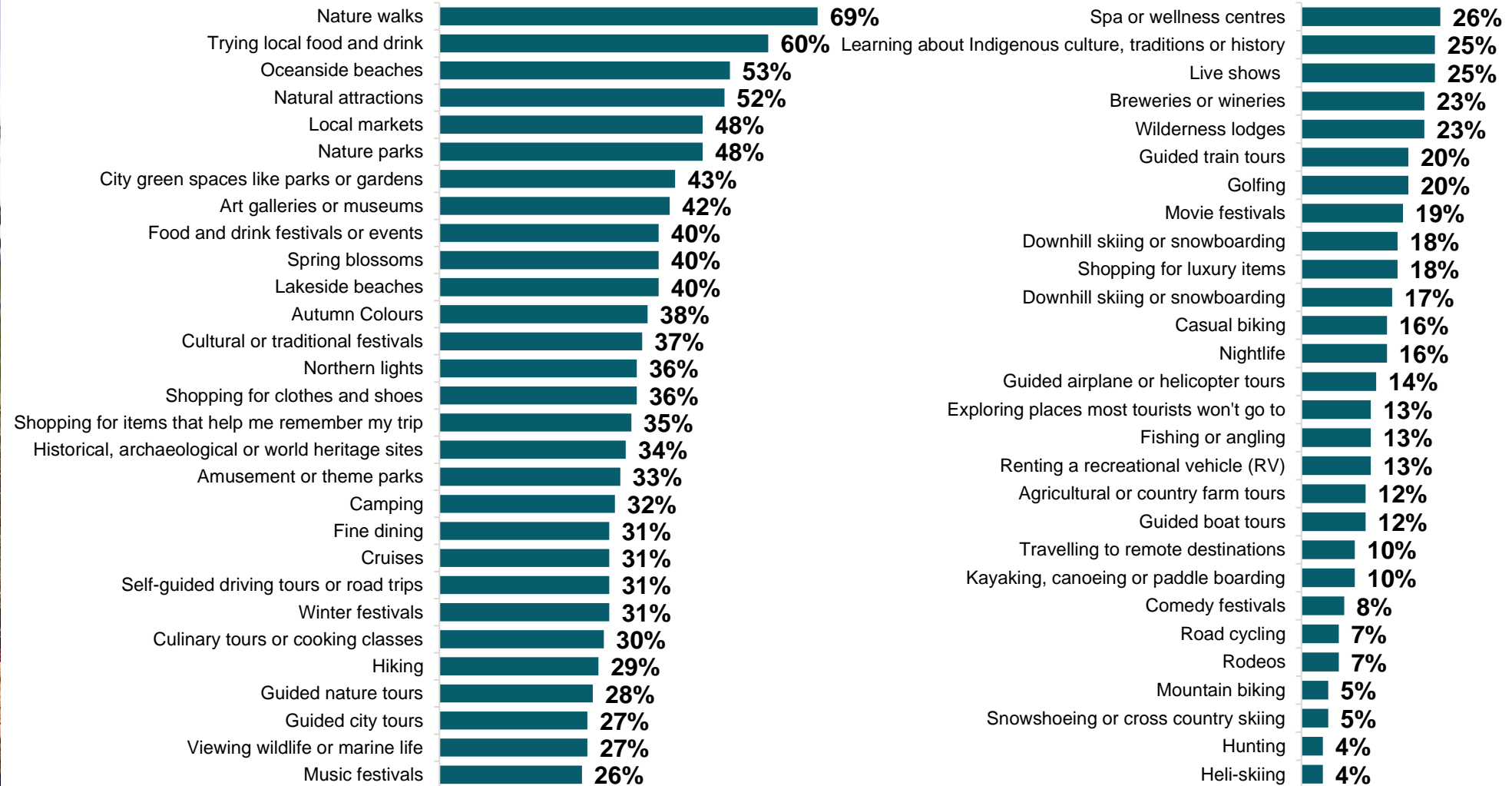


Winnipeg
Manitoba

South Korea GTRP
– December 2023



GENERAL ACTIVITIES INTERESTED IN (FULL LIST)



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603)
In general, what activities or places are you interested in while on holiday? (Select all that apply)



TOP 10 ACTIVITIES TO ANCHOR AN ENTIRE TRIP AROUND

Korean travellers are most likely to anchor their trip around local food and drinks, nature walks, and natural attractions.

37%

Trying Local Food and Drink

23%

Nature Parks

35%

Nature Walks

21%

Art Galleries or Museums

29%

Natural Attractions

19%

Historical, Archaeological, or World Heritage Sites

24%

Oceanside Beaches

18%

Northern Lights

24%

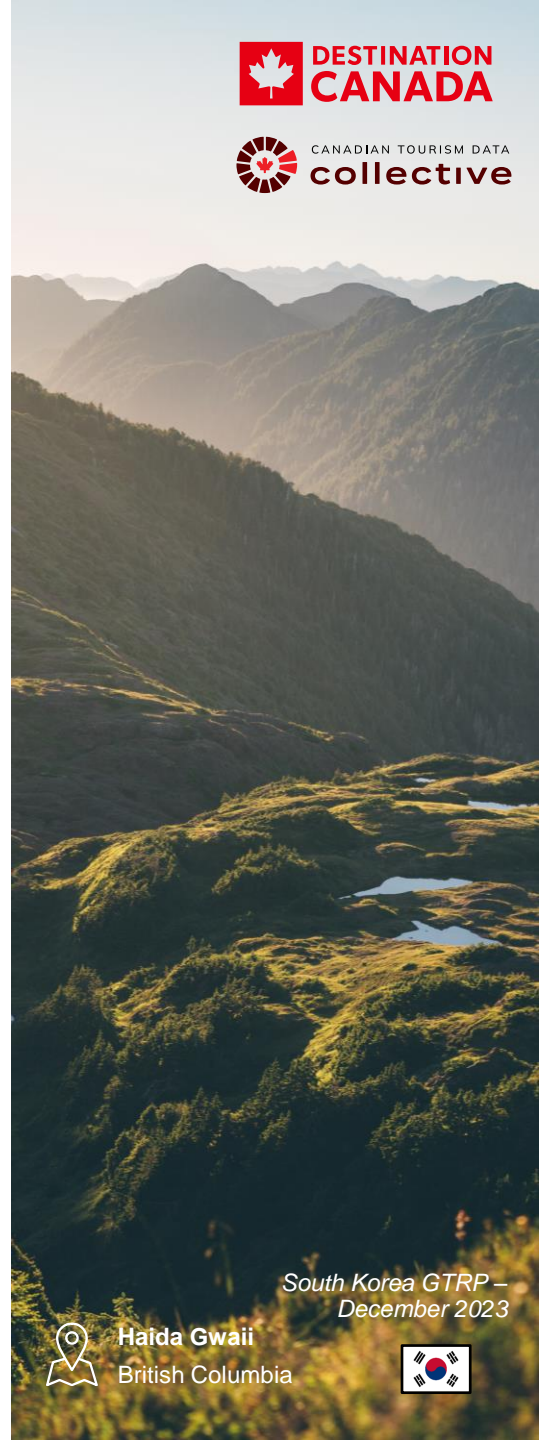
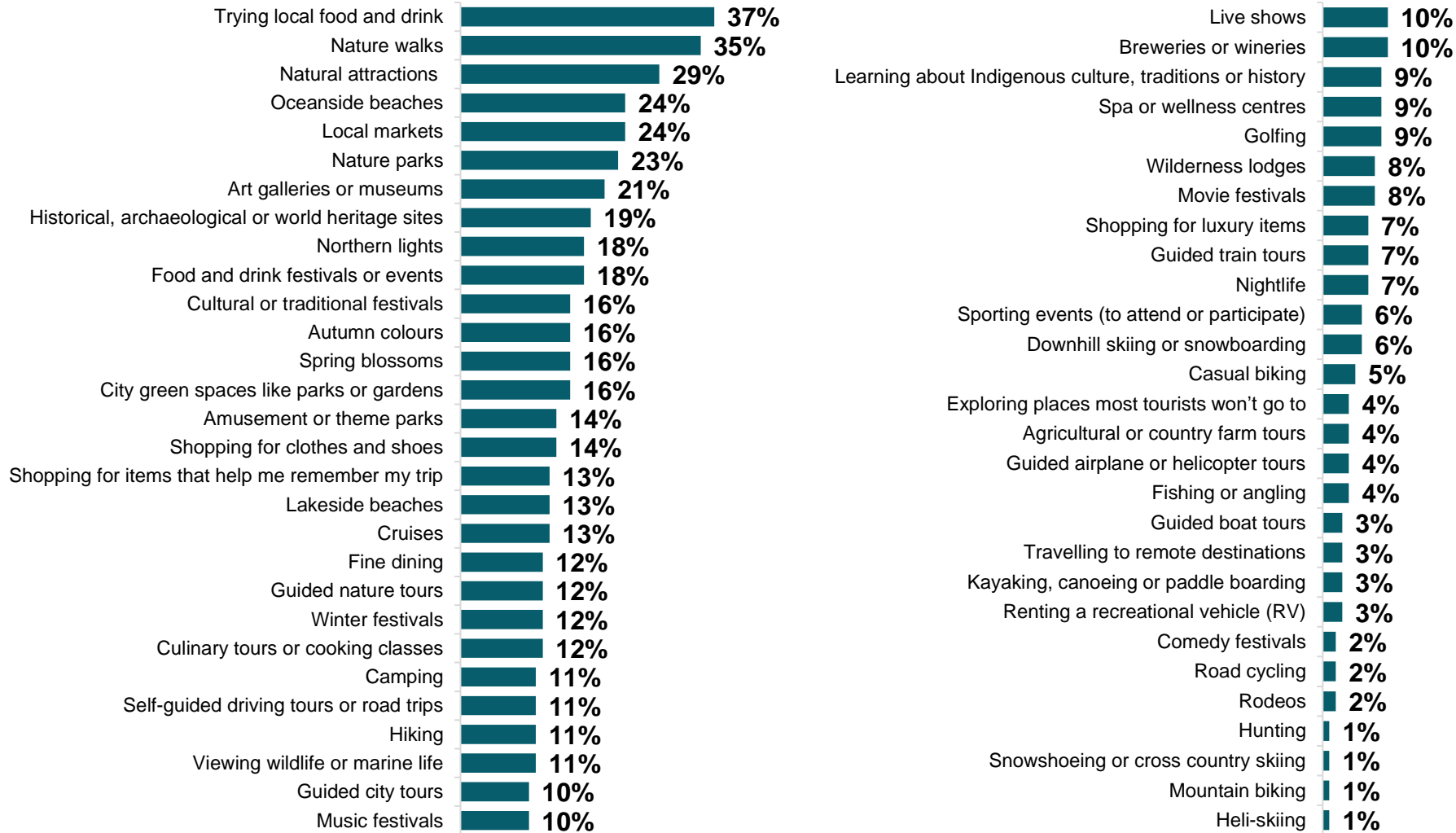
Local Markets

18%

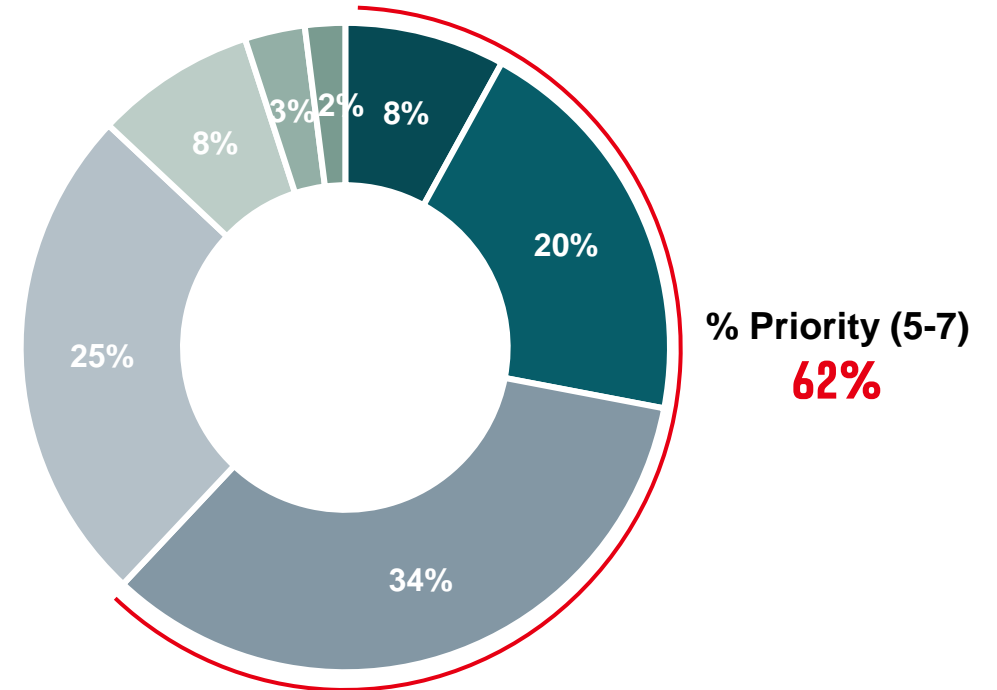
Food and Drink Festivals or Events

Base: Long-haul pleasure travellers (past 3 years or next 2 years) , selected an activity (n=1592)
Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

ACTIVITIES TO ANCHOR AN ENTIRE TRIP AROUND (FULL LIST)



PRIORITY OF SUSTAINABLE TRAVEL WHEN PLANNING A TRIP



■ 7 - Essential priority ■ 6 ■ 5 ■ 4 ■ 3 ■ 2 ■ 1 - Not a priority

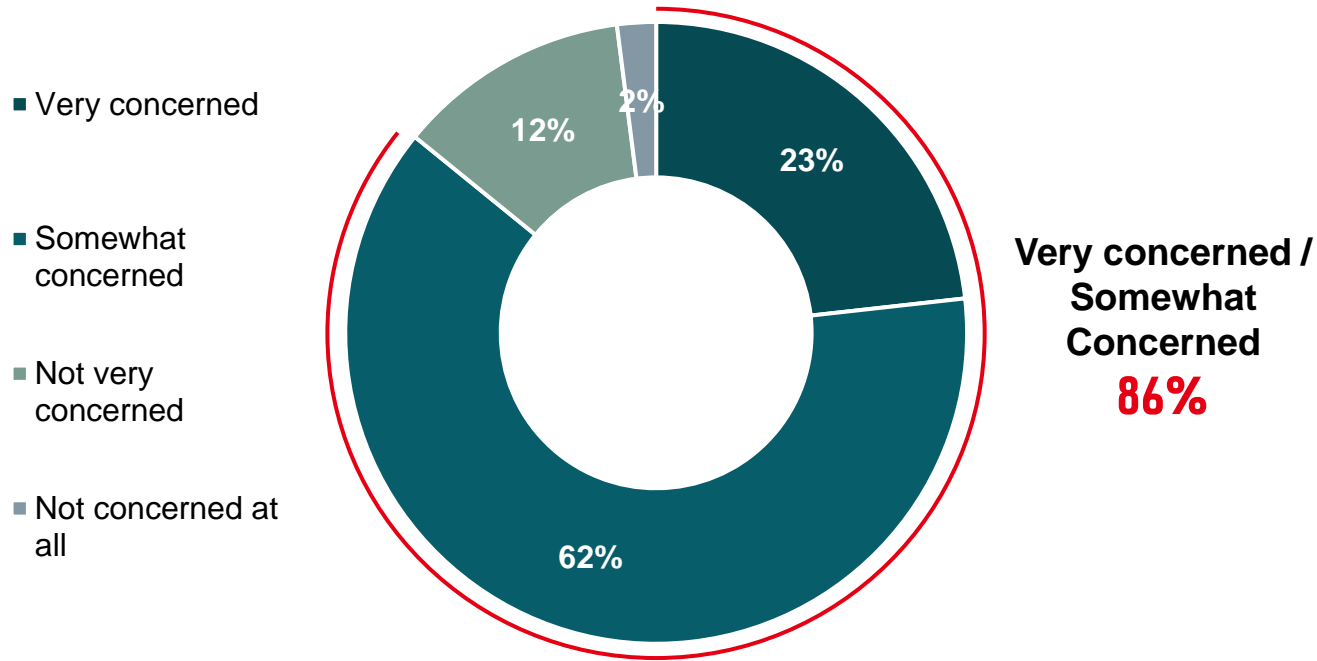
Six in ten Korean travellers consider sustainability a priority when travelling.



Nahanni
Northwest Territories

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603)
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'.
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



17% Changed/Cancelled plans in the past 3 years due to extreme weather events

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=832)
 How concerned are you about extreme weather events affecting your travel plans?
 In the past 3 years, have you ever had to change plans or cancel a trip due to extreme weather events?
 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.



Majority of Korean travellers are concerned about the impact of extreme weather on their travel plans.



CONSIDERING CANADA AS A TRAVEL DESTINATION

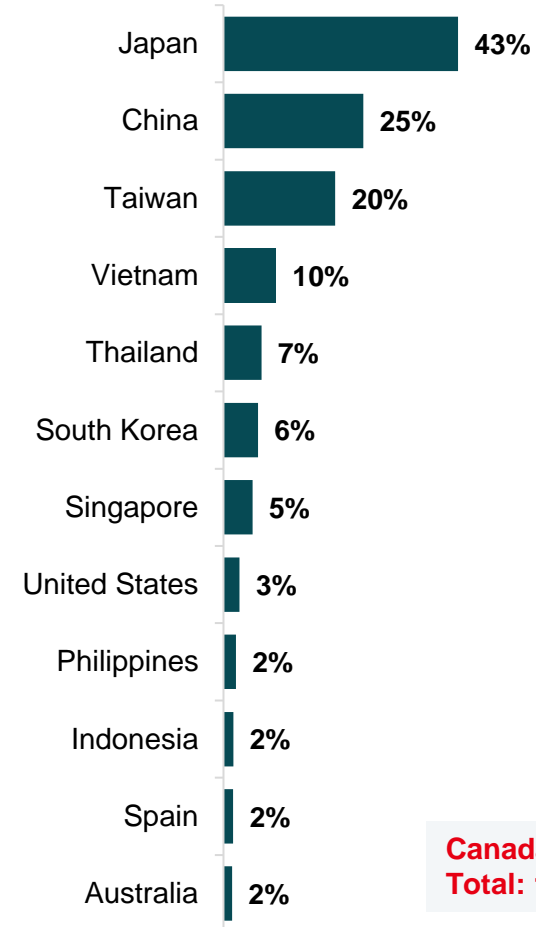


Peggy's Cove
Nova Scotia



UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹

On an unaided basis, Canada is not a top destination that Korean travellers are considering.

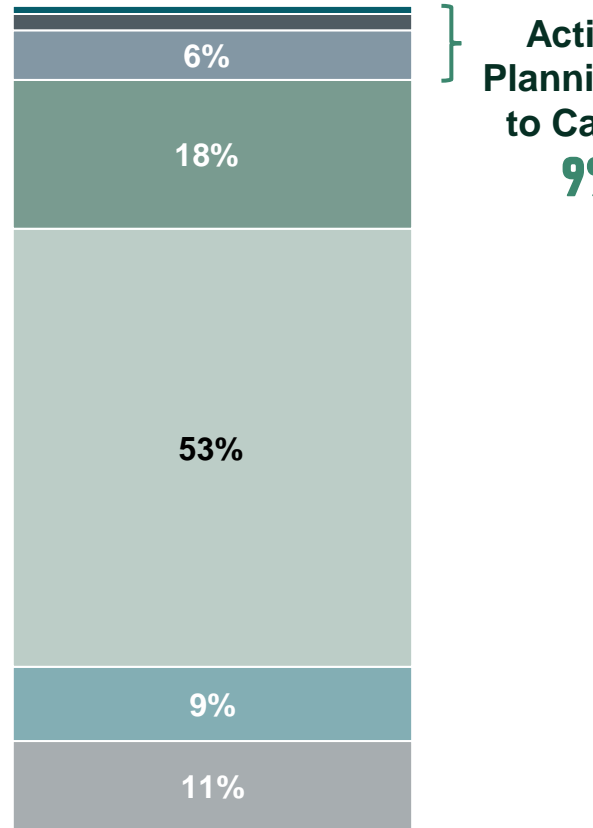


Canada receives:
Total: 1% mentions

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603)
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)
¹Note: Roll-up of brand mentions by country (e.g., percentage who said "Canada" or any destination in Canada).

STAGE IN THE PURCHASE CYCLE 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



Actively Planning trip to Canada 9%

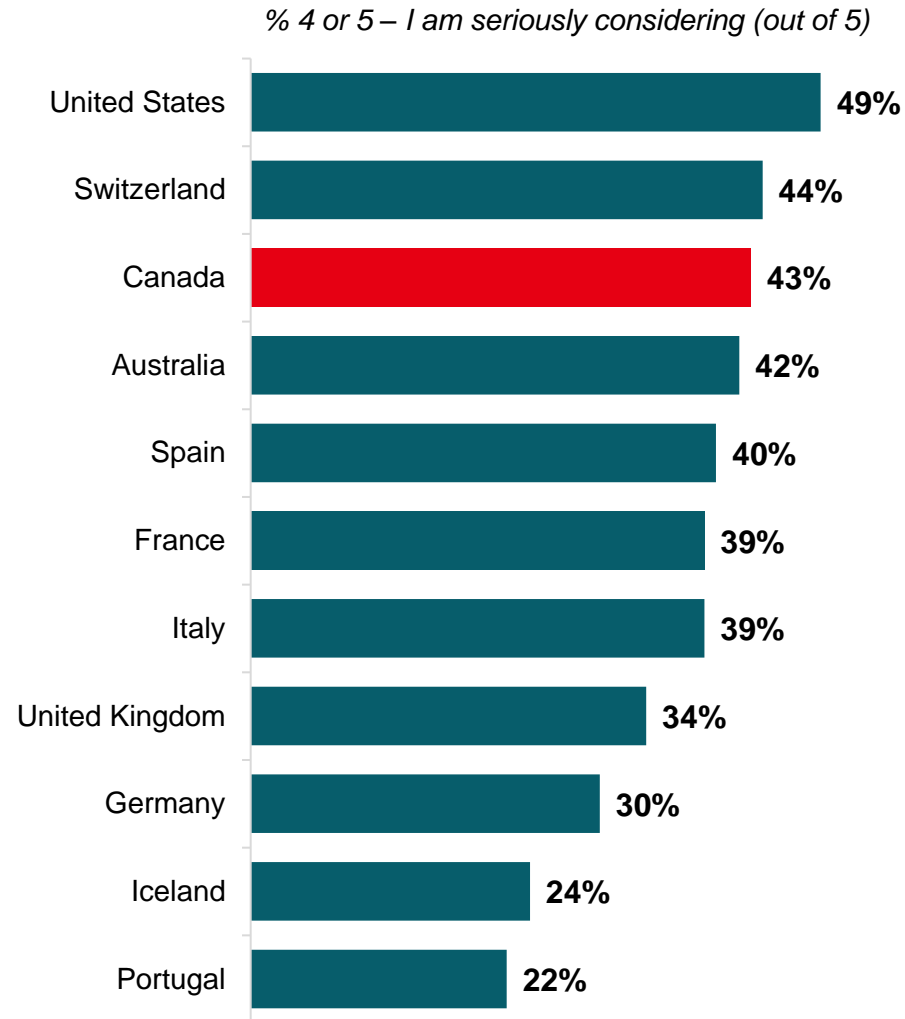
Almost one in ten Korean travellers are actively planning a trip to Canada.

Lake Louise
Alberta

South Korea GTRP – December 2023



NEXT 2 YEAR AIDED DESTINATION CONSIDERATION

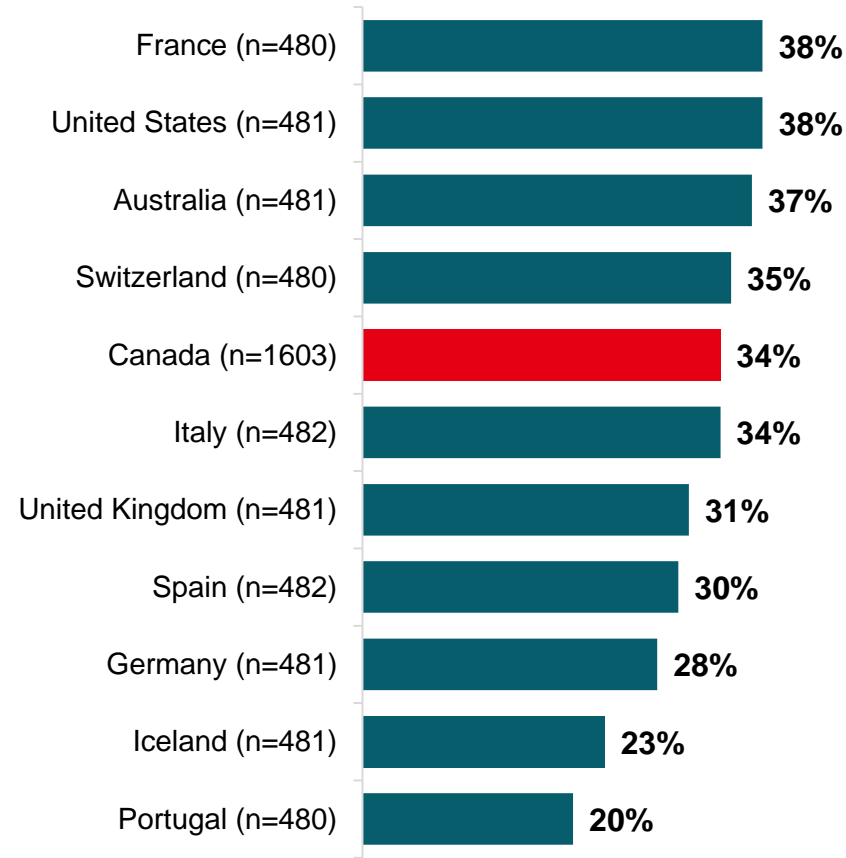


On an aided basis, Canada ranks third among the destinations being considered, behind the United States and Switzerland.

KNOWLEDGE OF HOLIDAY OPPORTUNITIES

Around one-third of Korean travellers say they have very good or excellent knowledge of holiday opportunities in Canada, ranking fifth behind France, the United States, Australia, and Switzerland.

% Very Good/Excellent



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated [DESTINATION]
How would you rate your level of knowledge of holiday opportunities in each of the following destinations? (Select one for each)



TRAVEL INTENTIONS TO CANADA

LIKELIHOOD TO TAKE A HOLIDAY TRIP TO CANADA (NEXT 2 YEARS)¹

Almost four in ten Korean travellers are planning to visit Canada in the next 2 years for a trip of any duration.

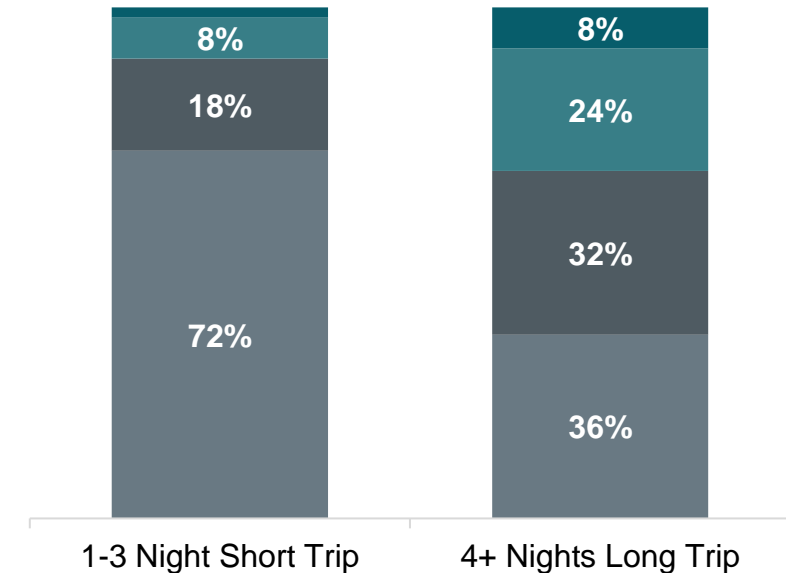
Definitely/Very likely for any number of nights
38%

% Definitely / Very Likely

10%

33%

- Definitely
- Very likely
- Somewhat likely
- Not interested

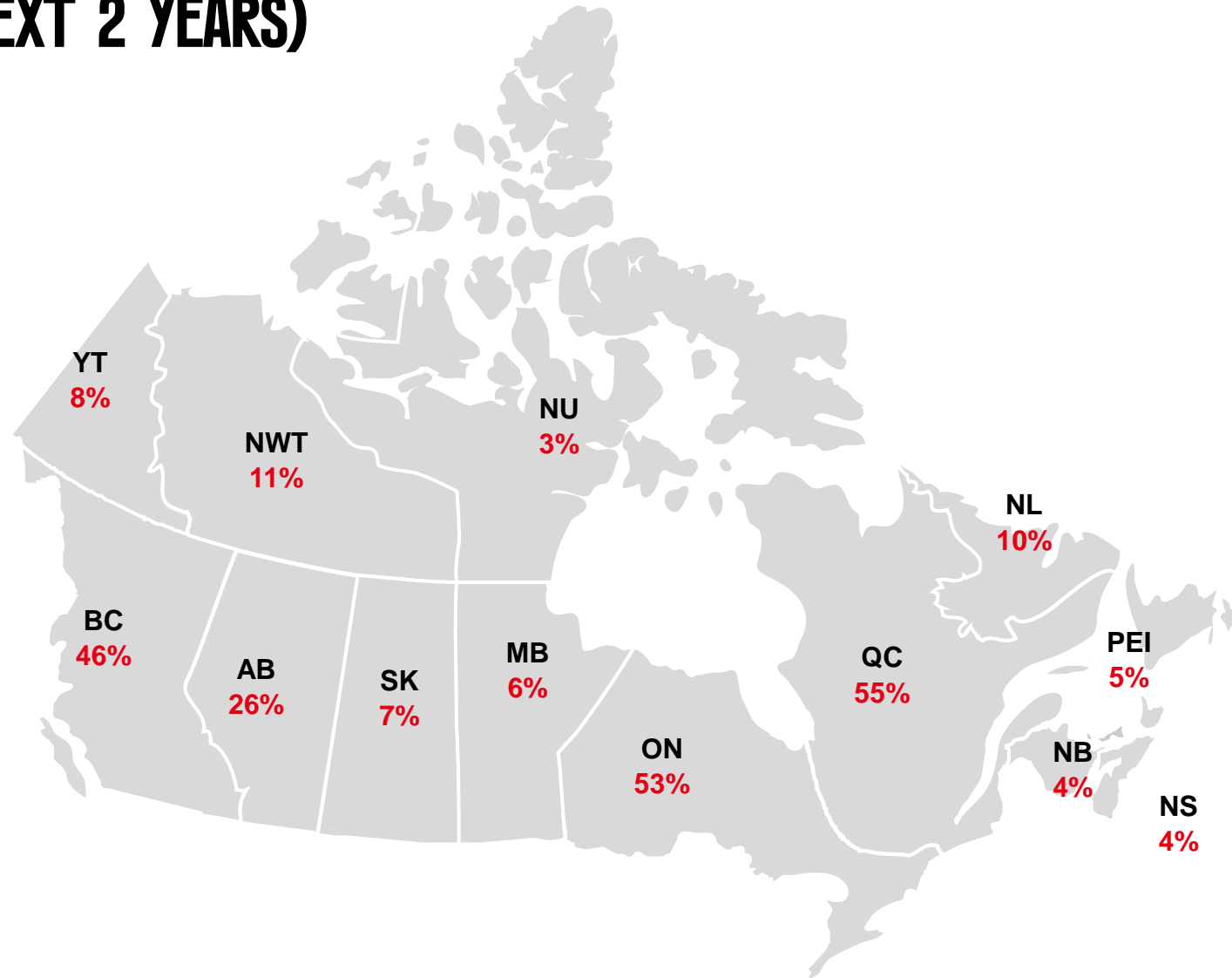


Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603)
Realistically, how likely are you to take a holiday trip to Canada in the next 2 years? (Select one)

¹Note: "Not interested" is comprised of those saying not very likely, not at all likely, or indicating no intention to visit Canada



LIKELIHOOD TO VISIT PROVINCE/TERRITORY (NEXT 2 YEARS)



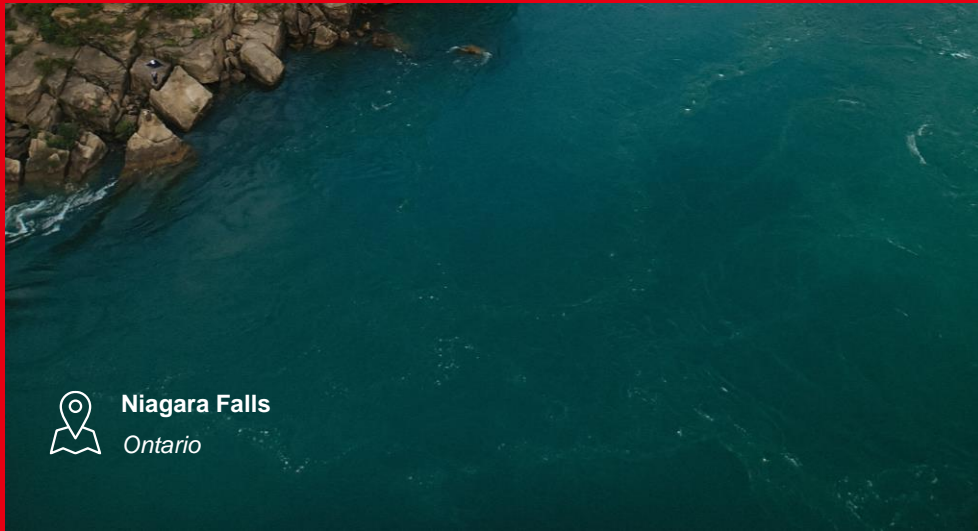
Korean travellers are most likely to visit Québec, Ontario, and British Columbia.



TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS)



Potential Korean travellers to Canada are most likely to visit Niagara Falls, Québec City, Toronto, Vancouver, and Montréal.



 **Niagara Falls**
Ontario

British Columbia	
Vancouver	36%
Rocky Mountains	24%
Victoria	21%
Whistler	8%
Okanagan	3%
Other – BC	2%

Alberta	
Rocky Mountains	18%
Calgary	13%
Banff	8%
Edmonton	6%
Jasper	4%
Other – AB	3%

Ontario	
Niagara Falls	43%
Toronto	36%
Ottawa	20%
Muskoka	4%
Other – ON	3%

Québec	
Québec City	38%
Montréal	35%
Mont Tremblant	19%
Other – QC	6%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1279)
Within [PROVINCE], which travel destinations are you likely to visit? (Select all that apply)

TRAVEL DESTINATIONS LIKELY TO VISIT (NEXT 2 YEARS) (CONTINUED)

Saskatchewan	
Regina	3%
Saskatoon	3%
Other – SK	2%

Manitoba	
Winnipeg	4%
Churchill	3%
Other – MB	1%

New Brunswick	
Saint John	3%
Fredericton	2%
Other – NB	1%

Nova Scotia	
Cape Breton	2%
Halifax	2%
Other – NS	1%

Prince Edward Island	
Charlottetown	5%
Other – PEI	2%

Newfoundland & Labrador	
St. John's	8%
Other – NL	3%

Yukon	
Whitehorse	5%
Dawson City	3%
Other – YT	1%

Northwest Territories	
Yellowknife	7%
Inuvik	3%
Other – NWT	3%

Nunavut	
Iqaluit	2%
Other – NU	1%



Less than ten percent of those likely to visit Canada plan on going to the Territories, Prairies, or Atlantic provinces.



TIME OF YEAR INTERESTED IN TAKING A TRIP TO CANADA (NEXT 2 YEARS)

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	9%	13%	13%	21%
Alberta	5%	8%	8%	12%
Saskatchewan	2%	3%	3%	2%
Manitoba	2%	3%	3%	3%
Ontario	7%	16%	18%	23%
Québec	10%	13%	18%	26%
New Brunswick	1%	3%	2%	1%
Nova Scotia	1%	2%	2%	2%
Prince Edward Island	1%	3%	2%	2%
Newfoundland & Labrador	2%	4%	3%	5%
Yukon	1%	3%	3%	3%
Northwest Territories	3%	4%	3%	5%
Nunavut	1%	1%	1%	1%

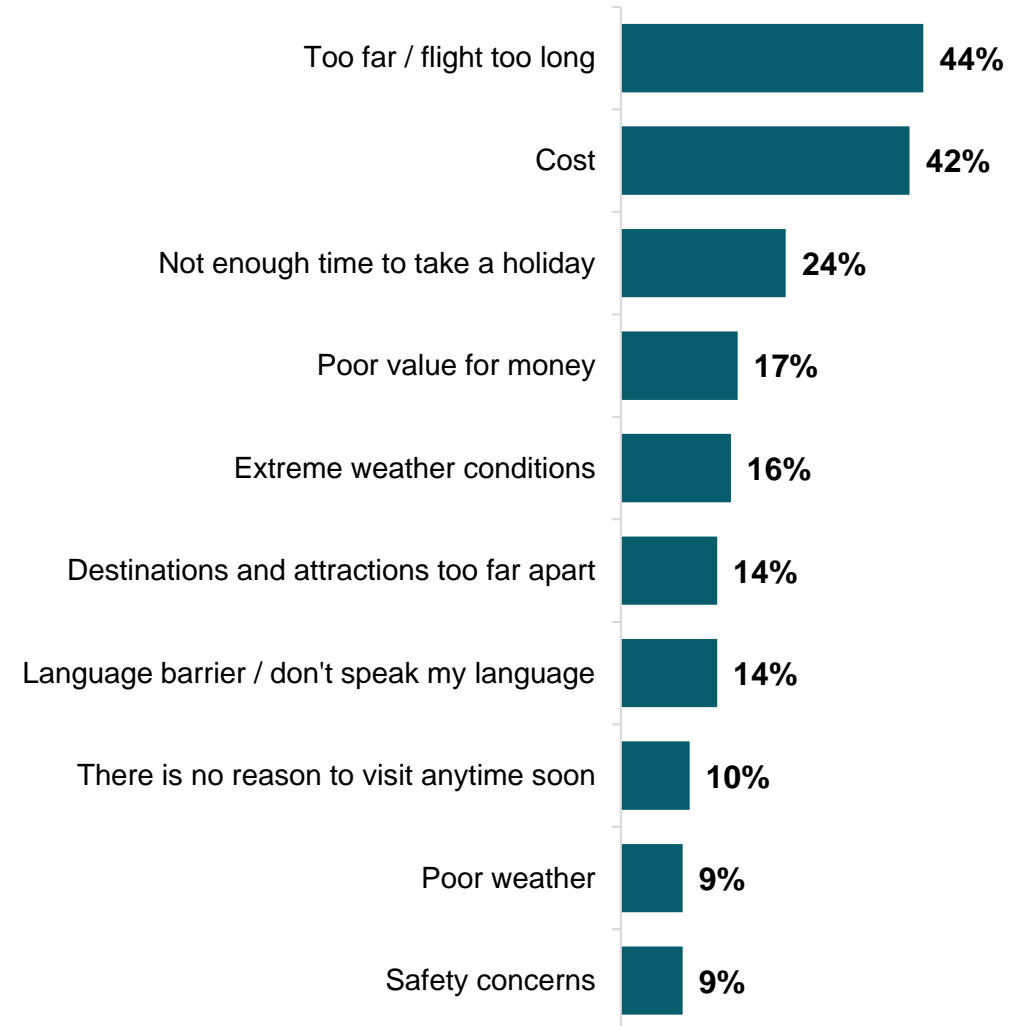


Potential Korean travellers to Canada are most interested in visiting during the fall months.



The top barriers for visiting Canada are the distance and cost.

TOP 10 BARRIERS FOR VISITING CANADA



Southern Lakes Resort
Yukon

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1603)
Which of the following factors might discourage you from visiting Canada? (Select all that apply)

South Korea GTRP – December 2023



SEASONAL TOURISM ACTIVITIES



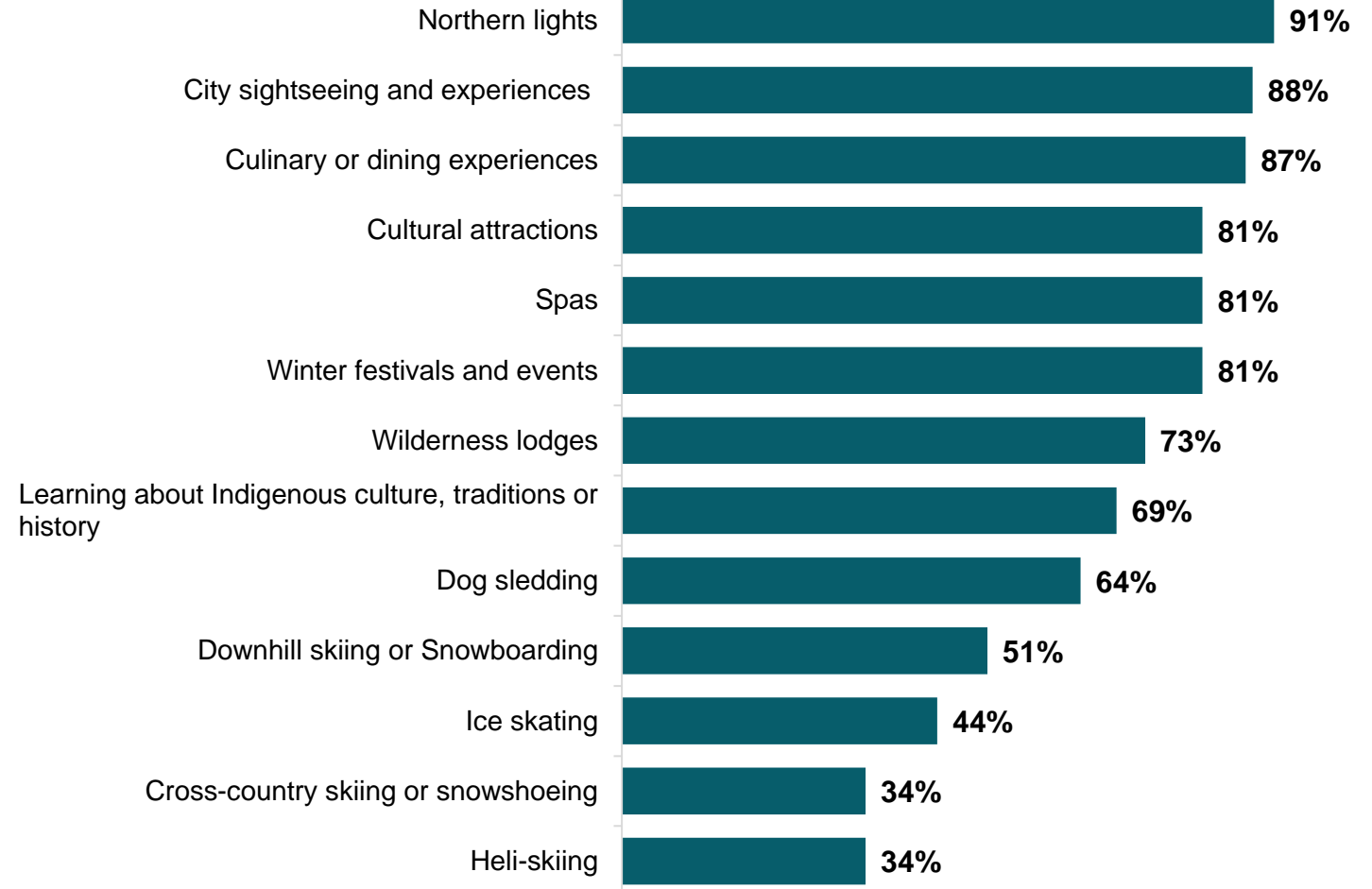
North Vancouver
British Columbia



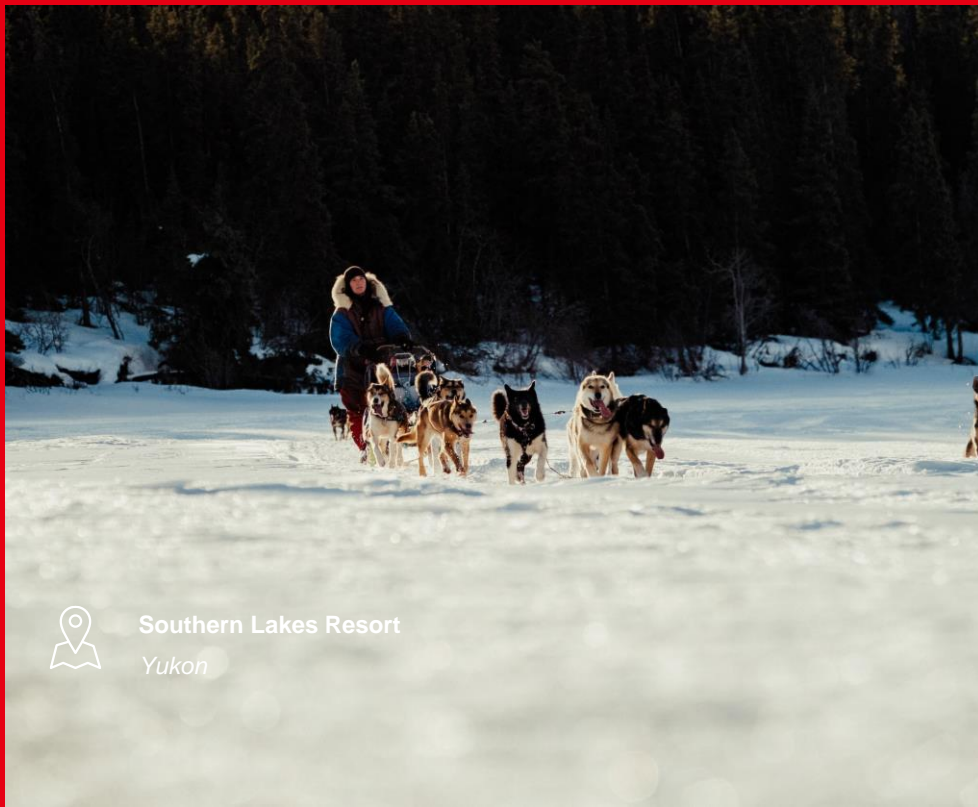
INTEREST IN WINTER ACTIVITIES IN CANADA

Potential Korean travellers to Canada are most interested in the Northern Lights, city sightseeing, and culinary experiences during the winter.

% Somewhat/Very interested



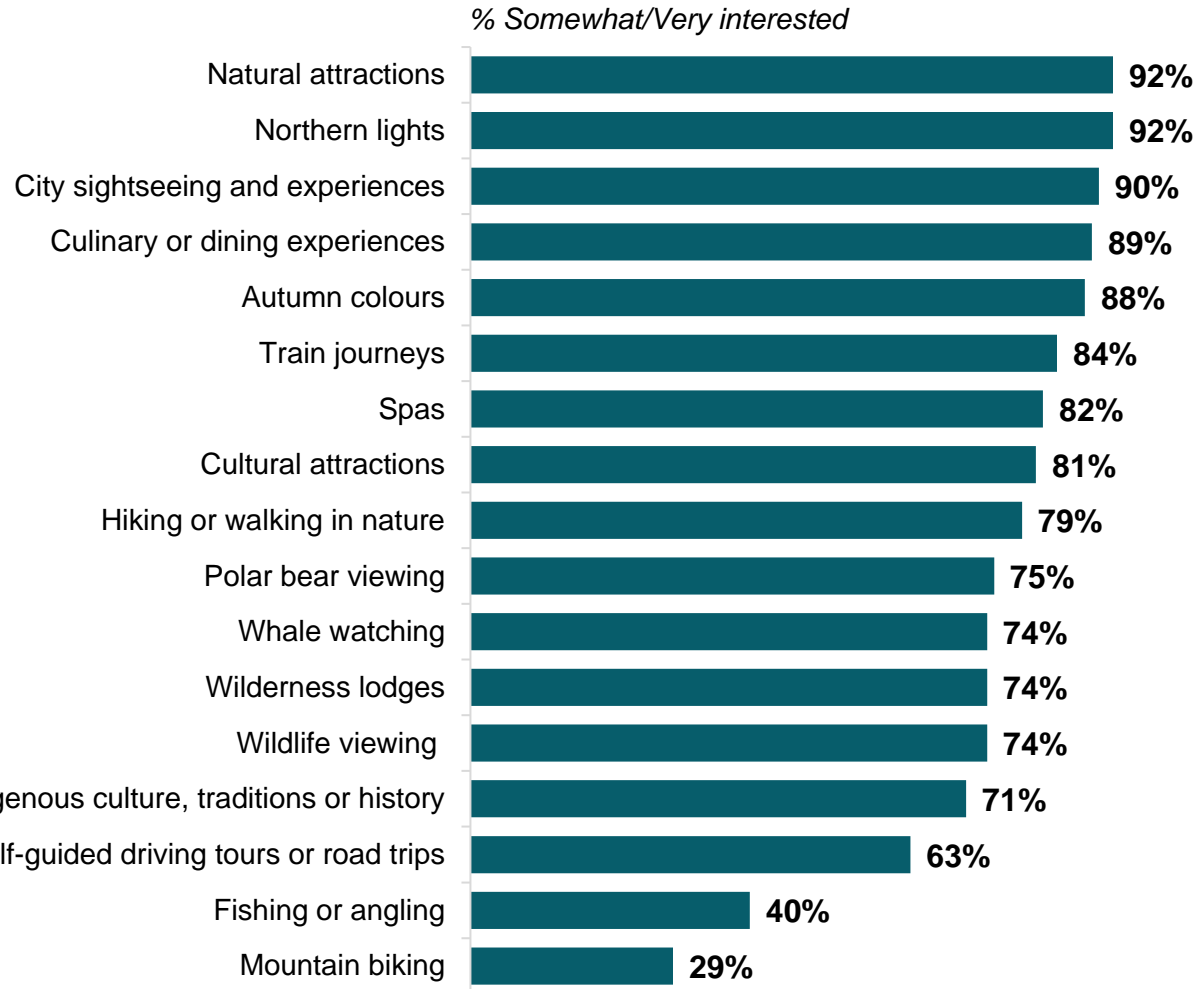
Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1279)
 What is your level of interest in the following activities or experiences in Canada during the **winter season**?
Winter Season Description: Winter is a season that is typically characterized by colder temperatures. 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.



Southern Lakes Resort

Yukon

INTEREST IN AUTUMN ACTIVITIES IN CANADA



Potential Korean travellers to Canada are most interested in experiencing natural attractions, the Northern Lights, and city sightseeing during the fall.

Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1279)

What is your level of interest in the following activities or experiences in Canada during the **autumn season**?

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.



INDIGENOUS TOURISM ACTIVITIES



British Columbia

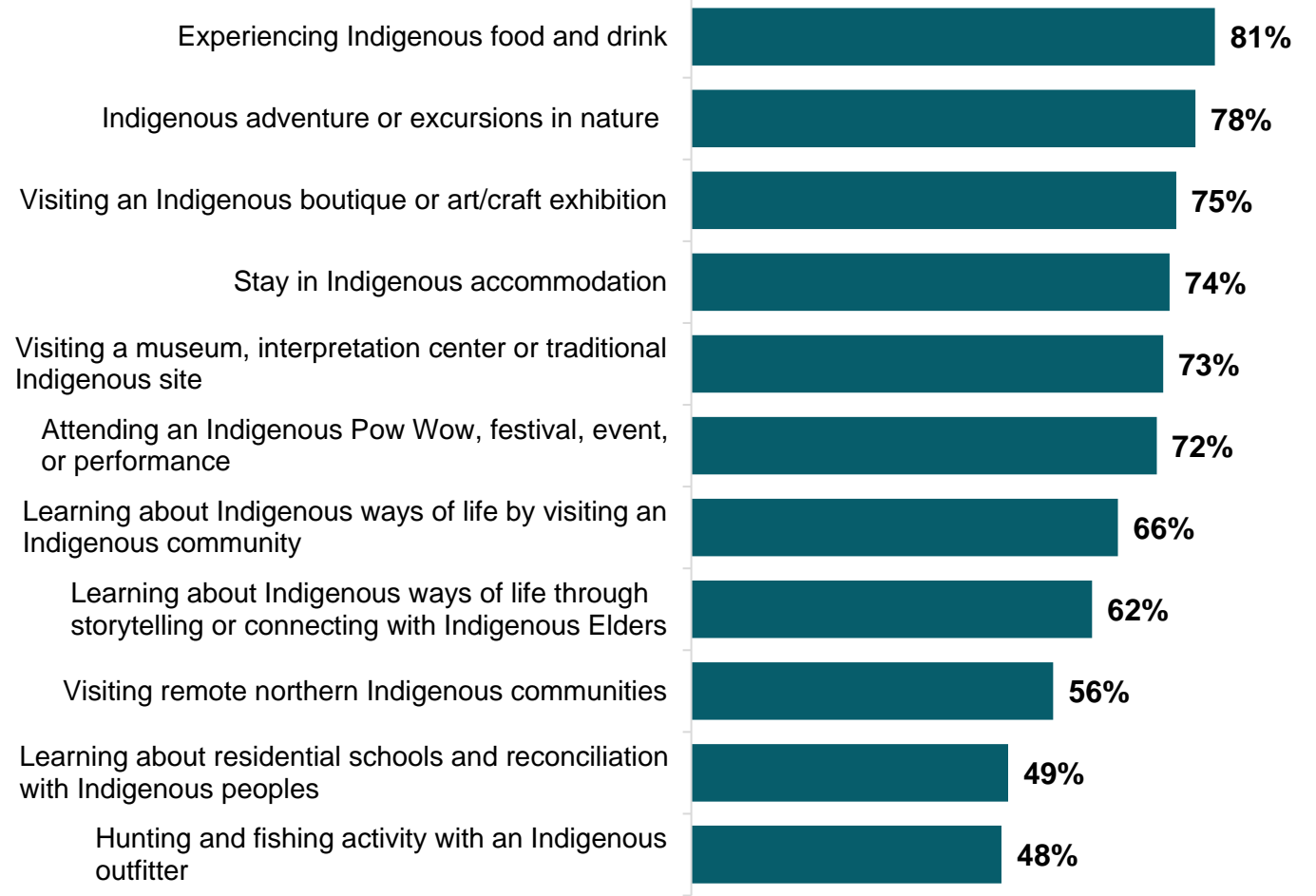


INTEREST IN INDIGENOUS CULTURAL & TOURISM ACTIVITIES

Potential Korean travellers to Canada are interested in Indigenous culture by engaging in culinary experiences, going on excursions in nature, and exploring arts and crafts.



% Somewhat/Very Interested



Base: Those in the dream to purchase stages of the path to purchase for Canada (n=1279)
What is your level of interest in the following Indigenous cultural experiences and tourism activities in Canada? 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.

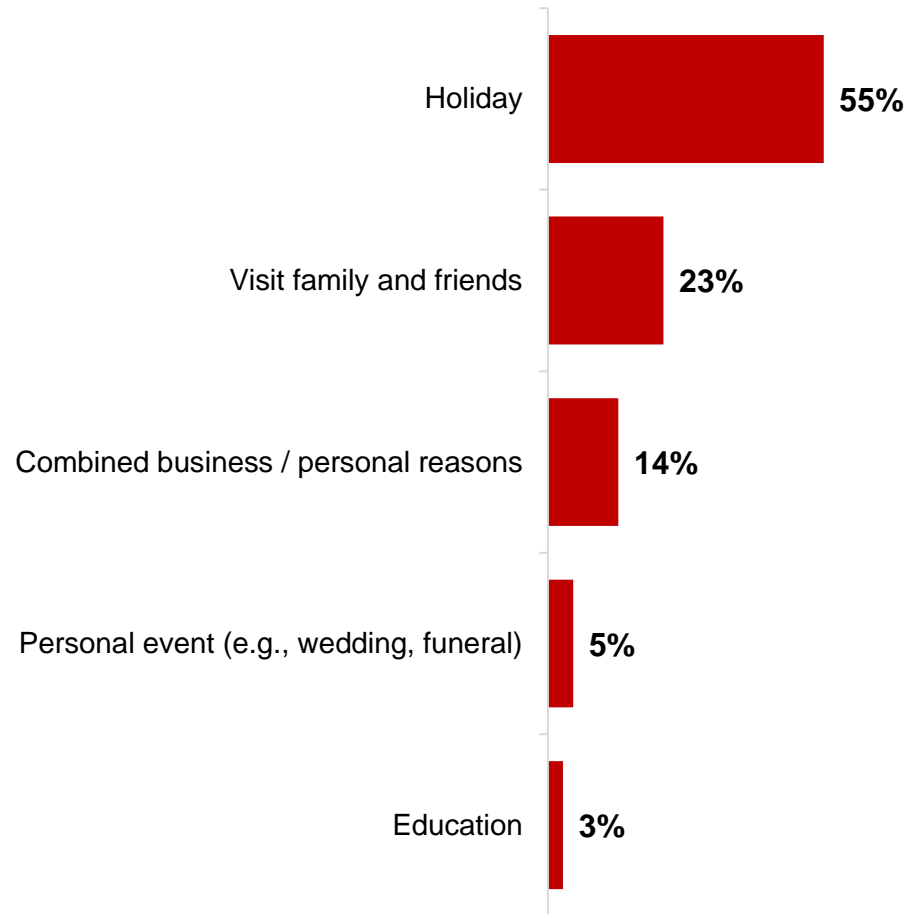
TRIP TO CANADA IN THE PAST 3 YEARS



Jasper
Alberta



MAIN PURPOSE OF PAST 3 YEAR TRIP TO CANADA



Travellers who visited Canada in the past 3 years were most likely to visit for holiday, followed by visiting family and friends.



TOP 10 ACTIVITIES PARTICIPATED IN DURING PAST 3 YEAR TRIP TO CANADA

Nature walks, shopping, natural attractions, and parks were the most popular activities among travellers to Canada in the past 3 years.

52%

Nature Walks

39%

Art Galleries or Museums

42%

Shopping For Items That Help Me Remember My Trip

37%

Lakeside Beaches

41%

Natural Attractions

36%

City Green Spaces like Parks or Gardens

40%

Nature Parks

34%

Shopping for Clothes

39%

Trying Local Food and Drink

33%

Oceanside Beaches

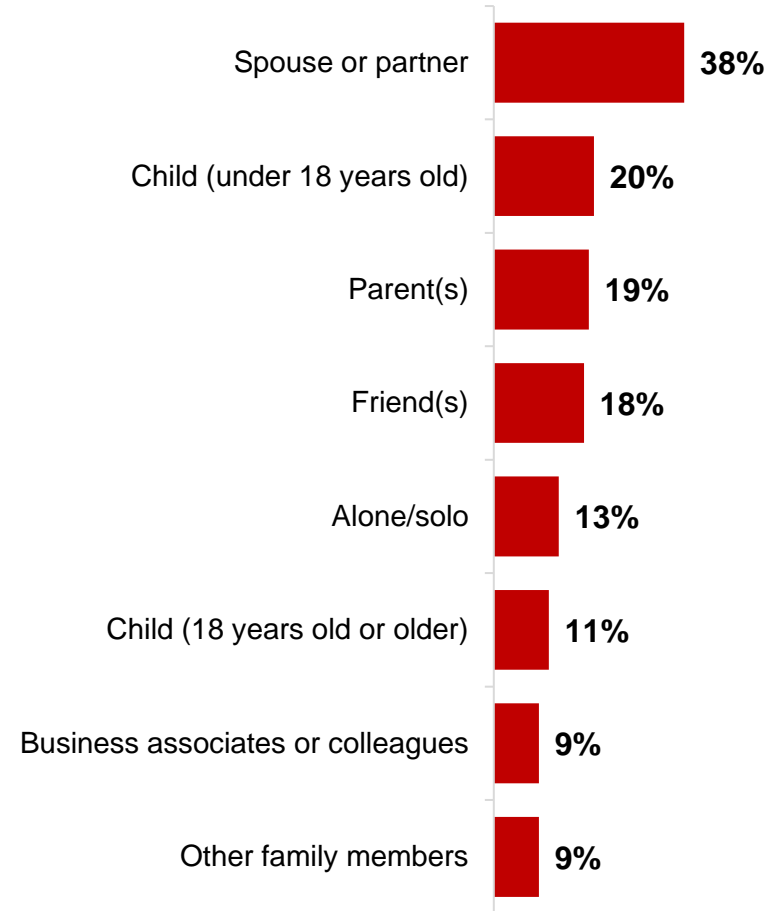
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=110)
Which of the following activities, if any, did you participate in during your recent trip to Canada? (Select all that apply)



Johnston Canyon
Alberta

TRAVEL PARTY OF PAST 3 YEAR TRIP TO CANADA

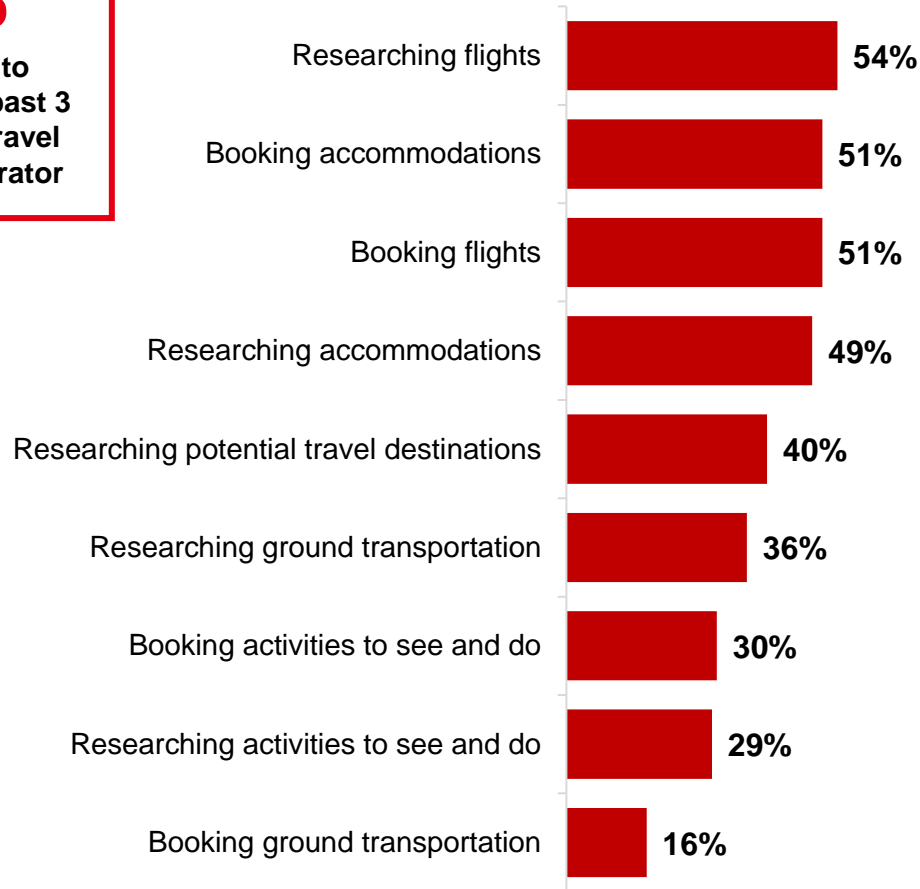
Travellers to Canada in the past 3 years were most likely to visit with their spouse or partner.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=110)
With whom did you travel on this trip? (Select all that apply)

TRAVEL AGENTS/TOUR OPERATOR USAGE FOR PAST 3 YEAR TRIP TO CANADA

65%
of travellers to Canada in the past 3 years used a travel agent/tour operator



Almost two-thirds of travellers to Canada in the past 3 years used a travel agent or tour operator, mostly to research flights or book accommodations / flights.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada, Used a Travel Agent/Tour Operator (n=73)
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)
Which of the following did a travel agent or tour operator help you with?

ORGANIZED GROUP TOUR USAGE FOR PAST 3 YEAR TRIP TO CANADA

One-third of travellers to Canada in the past 3 years state their whole trip was part of an organized group tour.

Yes, my whole trip was part of an organized group tour

33%

Yes, a portion of my trip was part of an organized group tour

29%

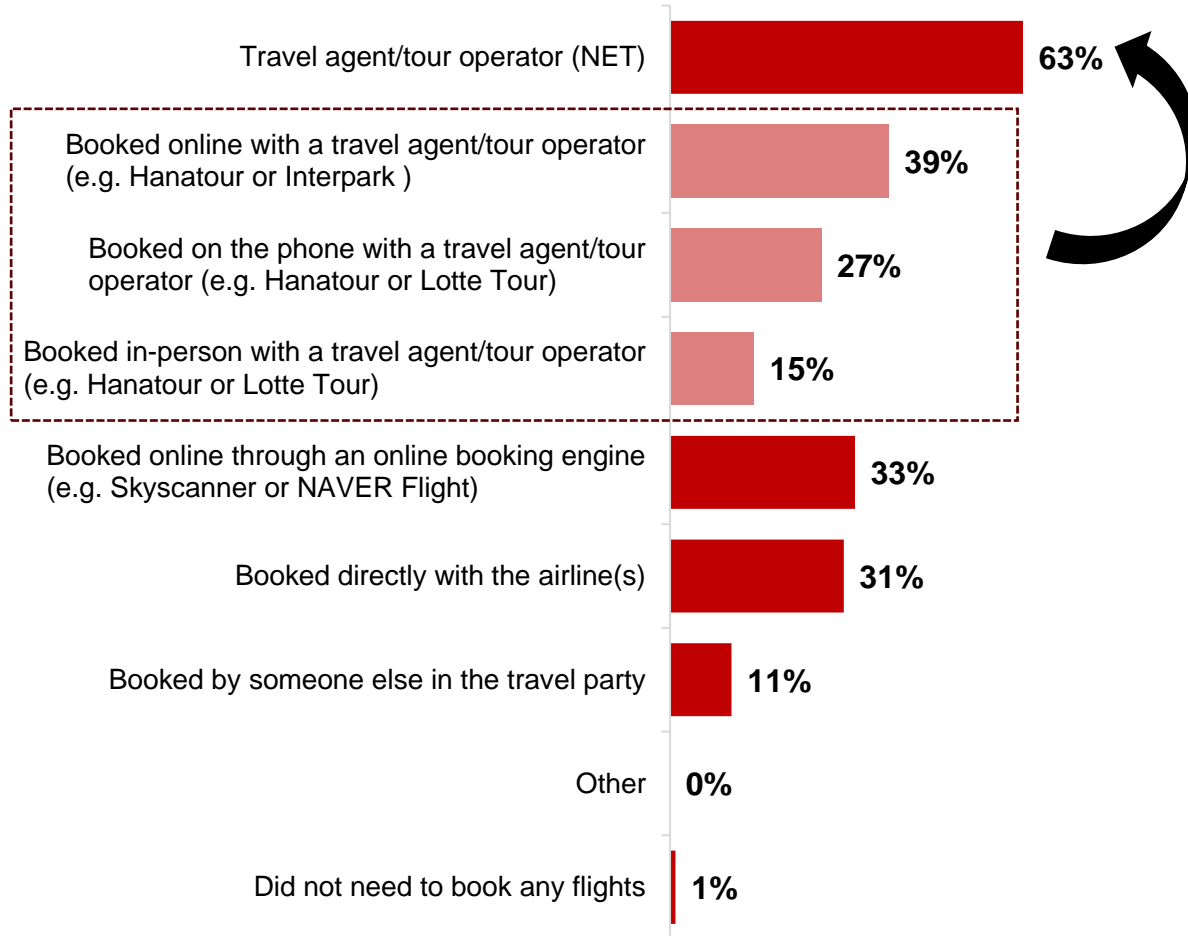
No

37%

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=110)
An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?



BOOKING FLIGHTS FOR PAST 3 YEAR TRIP TO CANADA

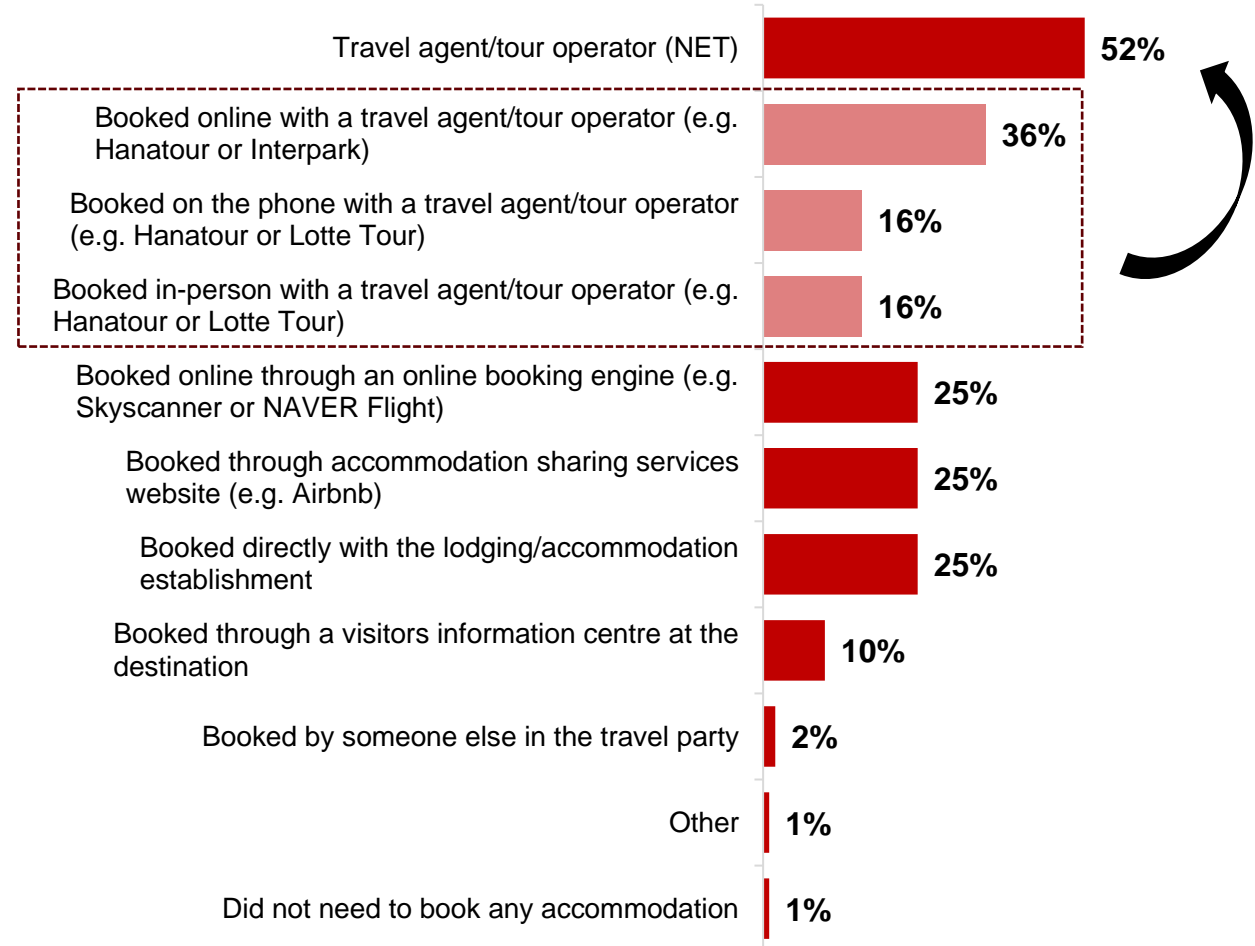


Over six in ten of travellers to Canada in the past 3 years booked flights through a travel agent or tour operator, with most booking online.



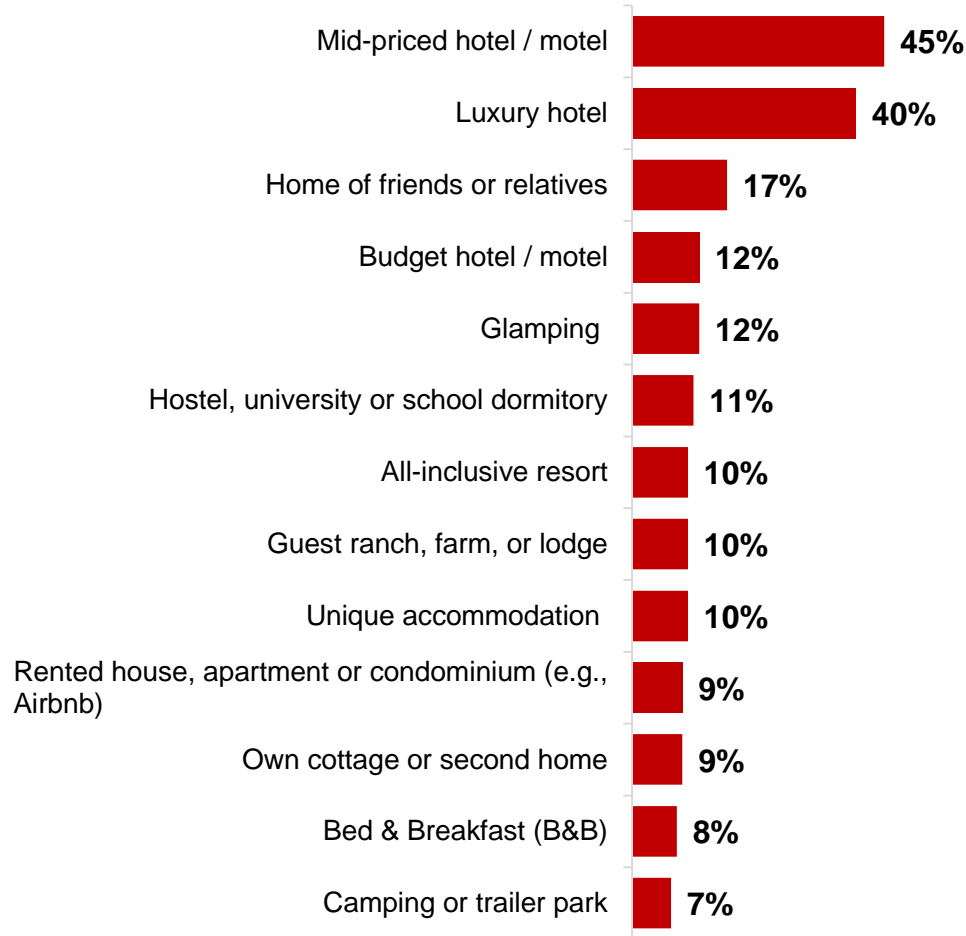
BOOKING ACCOMMODATIONS FOR PAST 3 YEAR TRIP TO CANADA

Over half of travellers to Canada in the past 3 years booked accommodations through a travel agent or tour operator, with most booking online.



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travellers to Canada (n=110)
How did you book your accommodation for this trip? (Select all that apply)

TYPES OF ACCOMMODATION DURING PAST 3 YEAR TRIP TO CANADA



Travellers to Canada in the past 3 years most likely stayed in either a mid-priced or luxury hotel.



THANK YOU

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



CANADIAN TOURISM DATA
collective