

# SOUTH KOREA MARKET PROFILES

As one of Asia's most dynamic outbound travel markets, South Korean travellers are driven by a desire for escape and relaxation, often seeking destinations with energetic cultural scenes that provide a true sense of renewal.

Time off from busy work schedules are often reserved for vacation, making each trip an important opportunity for both rejuvenation and discovery.



**SOUTH KOREA**



**DESTINATION  
CANADA**





# A GUIDE TO UNDERSTANDING THE PROFILE



## THE STRUCTURE

### Understand The Market

- Overall segment sizes in the market
- Segment comparison by key metrics

01

### Explore The Segments

- Detailed profiles per segment

04

### Glossary

- Additional definitions for key terminology referenced in this profile

104



## HOW TO READ THE DATA

Percentage (%) values are beneficial, but we must also consider how one segment compares to others

An **index** is a tool that helps you understand the relative performance or significance of a particular value. Think of it like a reference point or a benchmark

### FOR EXAMPLE:

Let's say **80%** of a segment who has been to Canada before loved their trip

On its own, this value might seem pretty good—after all, it's **80% satisfaction**

But if all other segments have a value of **90%+**, suddenly, that 80% doesn't look so great

Understanding indexes put values into perspective, allowing you to accurately assess their importance compared to the same value for the whole market

In these profiles, index values of **115+ are marked in blue** and mean the segment over-performs vs. the overall market. Values **under 85 are marked in orange** and mean the segment under-performs on this metric.



## KEY DEFINITIONS

When reading the profiles, key definitions will be provided at the bottom of the page in a box like the below.

**!** KEY terminology on this page...

Additional definitions and details can be accessed by visiting the [Glossary](#) which can be clicked to wherever you see blue text, or by scrolling down to **page 104**.



# MARKET OVERVIEW

## KEY MARKET HIGHLIGHTS

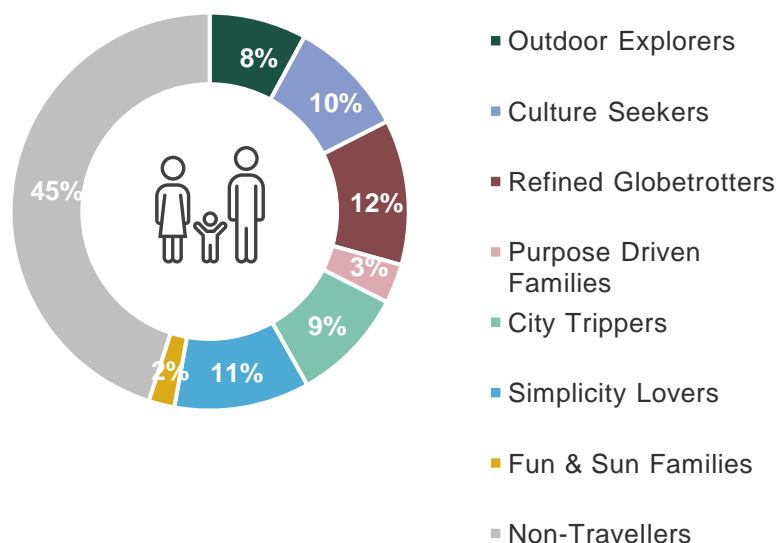
- Desire for unique experiences, whether it's adventure, cultural immersion, luxury, or family-friendly activities. Novelty is attractive.
- Well-developed tourism destinations, packaged offers, and popular attractions contribute to a sense of safety and reliability, which helps travellers focus on relaxing.
- General reliance on social media, apps, and online resources for travel inspiration, planning, and sharing journeys.

The South Korean market overindexes for Refined Globetrotters and Simplicity Lovers, with travellers particularly interested in local cuisine, festivals, and health & wellness activities.

South Korean travellers prioritize destinations that offer cultural richness and relaxation, often relying on expert support from travel providers to make the most of their holidays to trendy, charming destinations with developed infrastructure that provide an opportunity to relax and bond with loved ones.

# MARKET SIZING

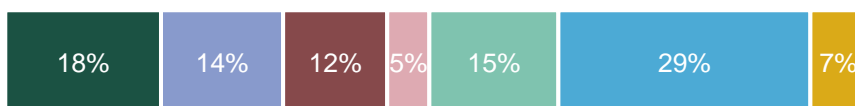
## POPULATION BREAKDOWN



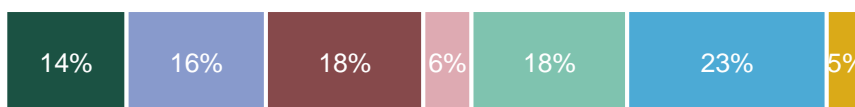
45% of the adult population in South Korea (est. 44M) are non-travellers (est. 20M). Reasons for not travelling include other commitments, limited vacations, and discomfort travelling due to health risks like Covid.

## OUTBOUND TRAVELLERS' BREAKDOWN

### Short-haul Travellers



### Mid-haul Travellers



### Long-haul Travellers



### Travellers To Canada



**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **SHORT / MID / LONG HAUL** – No-Flight or < 3 Hours Flight / 3–7 Hour Flight / 7+ Hours Flight
- **NON-TRAVELLER** – Has not travelled a minimum of one night away in paid accommodation in past 5 years OR is not actively planning to travel in next 2 years.

# MARKET SEGMENTS OVERVIEW

	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	3.6M	No	<ul style="list-style-type: none"> <li>○ Nature Experiences</li> <li>○ Water Sports</li> <li>○ Casual Sports</li> </ul>	<ul style="list-style-type: none"> <li>○ Adventure</li> <li>○ Connections</li> <li>○ Accomplishment</li> </ul>
CULTURE SEEKERS	4.2M	No	<ul style="list-style-type: none"> <li>○ Festivals &amp; Events</li> <li>○ Cuisine</li> <li>○ Cultural Experiences &amp; Attractions</li> </ul>	<ul style="list-style-type: none"> <li>○ Novel &amp; Authentic</li> <li>○ Connections</li> <li>○ Accomplishment</li> </ul>
REFINED GLOBETROTTERS	5.4M	Yes	<ul style="list-style-type: none"> <li>○ Cuisine</li> <li>○ Cultural Experiences &amp; Attractions</li> <li>○ Health &amp; Wellness</li> </ul>	<ul style="list-style-type: none"> <li>○ Novel &amp; Authentic</li> <li>○ Bonding</li> <li>○ Escape &amp; Relax</li> </ul>
PURPOSE DRIVEN FAMILIES	1.4M	No	<ul style="list-style-type: none"> <li>○ Family-Focused Attractions</li> <li>○ Cultural Experiences &amp; Attractions</li> <li>○ Festivals &amp; Events</li> </ul>	<ul style="list-style-type: none"> <li>○ Novel &amp; Authentic</li> <li>○ Bonding</li> <li>○ Traditions</li> </ul>
CITY TRIPPERS	4.0M	No	<ul style="list-style-type: none"> <li>○ Cuisine</li> <li>○ Shopping</li> <li>○ Festivals &amp; Events</li> </ul>	<ul style="list-style-type: none"> <li>○ Escape &amp; Relax</li> <li>○ Bonding</li> <li>○ Fun</li> </ul>
SIMPLICITY LOVERS	4.9M	No	<ul style="list-style-type: none"> <li>○ Cuisine</li> <li>○ Nature Experiences</li> <li>○ Health &amp; Wellness</li> </ul>	<ul style="list-style-type: none"> <li>○ Escape &amp; Relax</li> <li>○ Simplicity</li> <li>○ Security</li> </ul>
FUN & SUN FAMILIES	0.9M	No	<ul style="list-style-type: none"> <li>○ Family-Focused Attractions</li> <li>○ Nature Experiences</li> <li>○ Shopping</li> </ul>	<ul style="list-style-type: none"> <li>○ Escape &amp; Relax</li> <li>○ Bonding</li> <li>○ Fun</li> </ul>

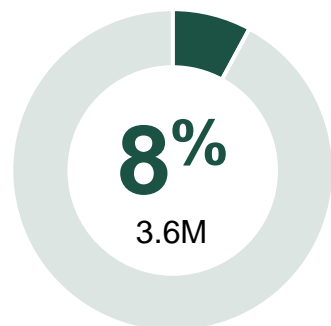
**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **DESTINATION CANADA PRIORITY SEGMENT** – Traveler segments prioritized by Destination Canada for targeted marketing and strategic efforts due to the opportunity they provide to contribute significantly to the Canadian tourism landscape. Aligning with these segments enables tourism partners to effectively coordinate with the national tourism strategy and maximizing their impact.
- **EMOTIONAL TRAVEL MOTIVATIONS** – These motivations were developed using factor analysis and provide insights into what drives traveller behaviour. Understanding these motivations helps to reveal drivers of more specific values and behaviours. For more detailed definitions of each base motivation please visit the Glossary.



# OUTDOOR EXPLORERS

PSYCHOGRAPHICS – SUMMARY



## % OF SOUTH KOREA POPULATION

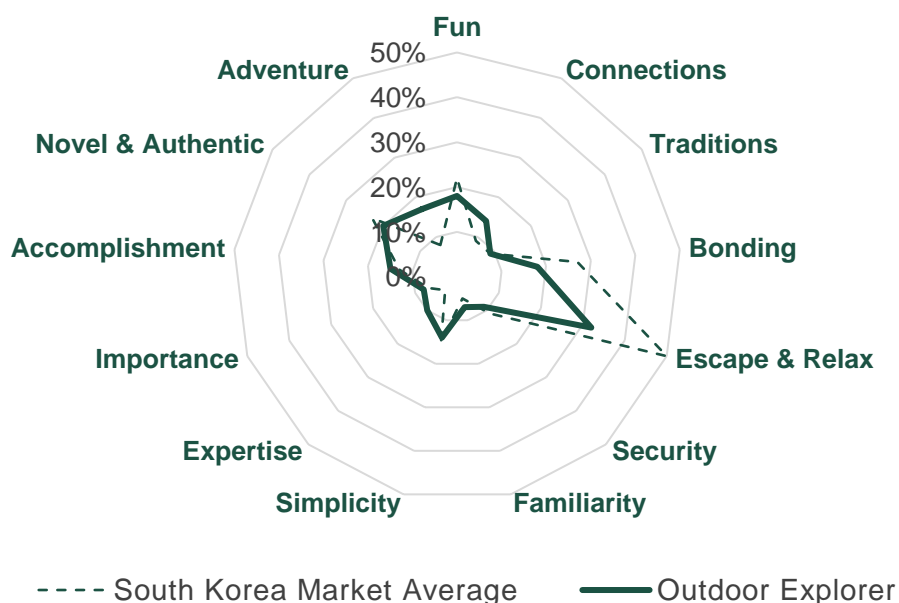
We are daring explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

We often seek accomplishment through physical activities, and spend on some unique and luxury experiences. We embrace both short getaways and longer holidays, relishing in nature and sports.

### WHAT YOU NEED TO KNOW ABOUT ME

- 1 We love travel and take all types of trips (domestic / international / business / bleisure).
- 2 We are nature enthusiasts driven by a sense of accomplishment from overcoming challenges in the great outdoors.
- 3 Activity and sports help us relax, and it is our version of self-care.
- 4 We like to get off the beaten path, open to exploring without an agenda, living in the moment, and staying flexible.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

**108**

#### How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison



### TRAVELLER ECONOMIC INDEX

**110**

#### How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison



# OUTDOOR EXPLORERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

- We value outdoor experiences for how they make us feel, live in the moment, and are not afraid of the effort it takes.
- Motivated by adventures that challenge us, we seek a feeling of discovery and accomplishment.
- We prioritize adventurous, free-spirited, and unexplored destinations.



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like my holiday to have some form of physical activity	70%	138
I generally think natural attractions are the highlights of my trip	62%	145
I'm passionate about travelling	61%	130
I feel best on vacation when being highly active	50%	119
I'm more interested in the present and don't focus much on the history of where I visit	49%	123
Even while travelling, I like to maintain regular contact with my duties or obligations back home	48%	145
I go where I want to go, no matter the hurdles	45%	140
I'm open to unconventional accommodations when travelling	45%	135
I seek out destinations that offer quiet opportunities for deep self-reflection	43%	118
Luxury experiences are an important part of travel	41%	114
Local cuisine is not a priority for me; I focus on other aspects of travel	38%	140
I like to keep my travel plans flexible and often book on short notice	38%	141
I seek out fine dining experiences and gourmet cuisine when I travel	29%	123



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel a sense of adventure	19%	152
To feel connected with new people	14%	120
To be proud to share my travel experiences	14%	142
To feel confident travel with no surprises	11%	150
To feel like a travel expert	10%	141
To be familiar with my surroundings	8%	120



## DESIRED DESTINATION

	SCORE	INDEX
Adventurous	33%	153
Free-Spirited	25%	112
Open	24%	101
Passionate	15%	110
Unexplored	11%	147
Exclusive	7%	114



# OUTDOOR EXPLORERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We are likely male, under 35 years of age. and likely do not have children in the home.
- We are working full-time earning a conservative income.
- Find us all over South Korea, though a bit less in Chungcheong.



### AGE

	SCORE	INDEX
18-34	31%	116
35-54	36%	94
55+	33%	94
MEAN YEARS	45.4	88



### HH INCOME (CAD)\*

	SCORE	INDEX
Less than \$2.5K	21%	100
\$2.5K to <\$8K	66%	101
\$8K or more	10%	106
Refused	3%	74

\* HH Income reported by month



### EMPLOYMENT

	SCORE	INDEX
Employed FT	59%	108
Employed PT	5%	75
Self-employed	9%	77
Retired	8%	103



### EDUCATION

	SCORE	INDEX
Primary education or less	3%	150
Secondary education	19%	113
Post-secondary education	78%	79



**73%**

103 Have a valid passport



### GENDER

**63%**

133 Male

**37%**

67 Female

**0%**

Non-binary / Other



### HOUSEHOLD

**36%**

103 Children <18 Living At Home\*

**21%**

89 Children 18+ Living At Home\*

**13%**

100 Children NOT Living At Home\*

**51%**

96 No Children

\* Option is not exclusive



### SOUTH KOREA CITY BREAKOUT

	SCORE	INDEX
Gyeonggi-do	31%	95
Seoul	21%	101
Gyeongsangnam-do	9%	115
Gyeongsangbuk-do	7%	109
Chungcheongbuk-do	6%	117
Daegu	5%	127

	SCORE	INDEX
Jeollabuk-do	5%	110
Gangwon-do	3%	135
Gwangju	3%	127
Jeollanam-do	3%	85
Chungcheongnam-do	3%	83



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL HABITS



## TRAVEL TRADE INDEX: NON-GROUP

94

## TRAVEL TRADE INDEX: GROUP

97

### ! KEY terminology on this page

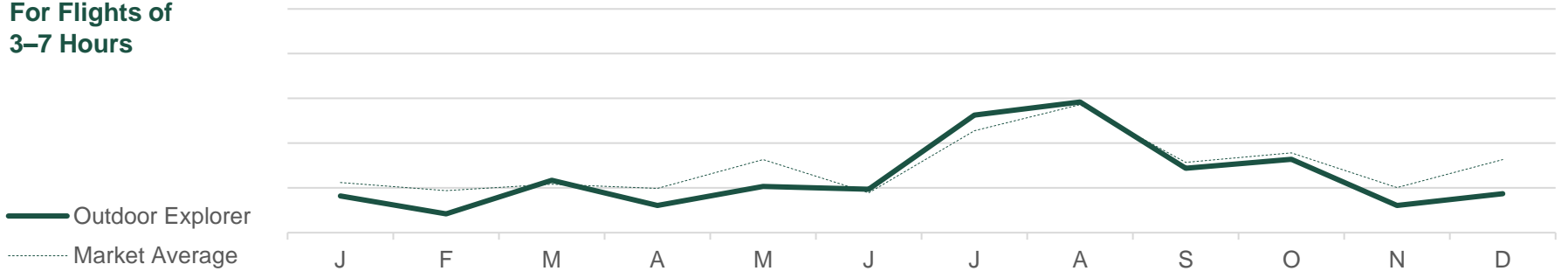
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP** – The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

For additional definitions see [Glossary](#)

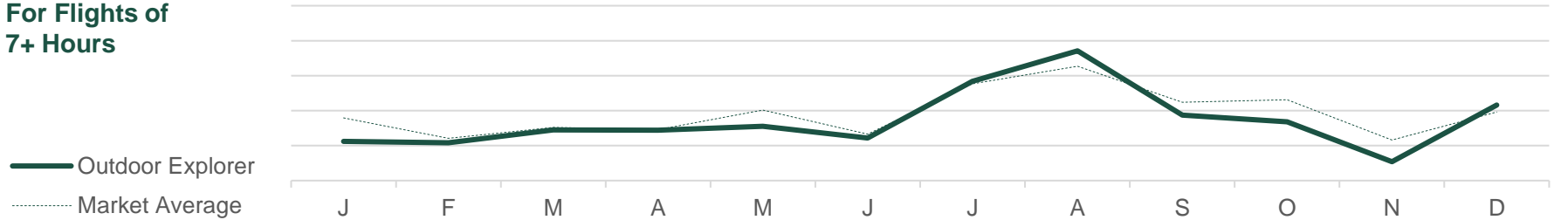


## TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



## TRIP DURATION

INDEX

1-2 Days	44%	61
3-5 Days	26%	92
1 Week Holiday	7%	95
2 Weeks Holiday	6%	129
3 Weeks Or More	5%	119

*Incidence is frequency of 2+ times per year*



## TRIP TYPE

INDEX

Domestic Leisure	49%	60
International Leisure	16%	93
Business Trip	17%	93
Added Personal To Business	10%	113
Worked During Vacation	5%	101

*Incidence is frequency of 2+ times per year*





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	47%	55
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	22%	87
Premium Hotel	17%	98
All-inclusive resort	17%	110
Bed & Breakfast	16%	107
Vacation Rental (e.g., Airbnb, Vrbo)	15%	125



## THOUGHTS ON INDIGENOUS TRAVEL

# 50%

111 INDEX SCORE

**I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit**

# 6%

79 INDEX SCORE

**Strong Interest In Indigenous Activities**



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I like to explore places that are off the beaten path and less explored	60%	146
You only ever get to know a country by experiencing its culture	58%	89
I'm willing to put in the effort while travelling in order to see lesser-known places	55%	130
I really want to learn about the history of the destinations I visit	51%	77
I'm open to travelling to destinations with limited tourist infrastructure	37%	144
I'm open to visiting destinations with challenging climates or weather conditions	33%	129



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

- We travel with our partner, and sometimes with friends or alone.
- Our budgets are moderate to above average, as we are willing to spend when we travel.



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	54%	91
Adult relatives	21%	72
Kids	20%	100
Solo	16%	119
Friends	15%	100



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

# \$2,710

111  
INDEX SCORE

### SPEND STYLE

Premium / Upscale



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	57%	122
It's important to me that I visit somewhere that is open to diversity and inclusion	54%	83
I consider the impact that I personally have on the destinations I visit	51%	99
Hearing from underrepresented communities is an important part of travelling	46%	110
It's important for me to know that the money I spend will support the local economy I'm visiting	39%	117

# 71%

## PRIORITIZE SUSTAINABLE TRAVEL

123 INDEX SCORE

**!** **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIORITIZE SUSTAINABLE TRAVEL** – The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES



## OVERALL INSIGHT

- We seek the outdoors, adventuring in nature and exploring all types of sports.
- Overnight experiences offering exploration or retreats are also of interest.



## TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Nature experiences <ul style="list-style-type: none"> <li>○ See or explore mountains</li> <li>○ Camping</li> <li>○ Explore wilderness or backcountry</li> </ul>	44%	100
	17%	128
	15%	134
	6%	134
Water-based sports <ul style="list-style-type: none"> <li>○ Scuba diving or snorkeling</li> <li>○ Swimming</li> </ul>	25%	152
	9%	130
	9%	145
Casual sports <ul style="list-style-type: none"> <li>○ Golfing</li> <li>○ Fishing</li> </ul>	22%	148
	10%	133
	6%	123
Winter-based sports <ul style="list-style-type: none"> <li>○ Snowboarding or downhill skiing</li> <li>○ Ice skating or hockey</li> </ul>	15%	147
	9%	144
	3%	133
High-intensity sports <ul style="list-style-type: none"> <li>○ Bungee jumping or skydiving</li> <li>○ Rock climbing</li> </ul>	12%	146
	5%	140
	4%	147
Cultural experiences or attractions	39%	59
Health and wellness	33%	76
Festivals and events	30%	90
Local cuisine	31%	48
Family-focused attractions	20%	86
Guided tours	20%	86
Shopping	17%	62





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To escape from routine	58%	89	47%	75
To relax and unwind	44%	84	37%	67
To spend time with family	51%	97	60%	97
To be pampered	40%	126	33%	101
To have fun with friends	15%	107	29%	140
To check off dream travel places	30%	113	22%	109
To have memories from top travel spots	11%	91	19%	123
To learn through other cultures	13%	64	17%	78
For personal reflection and growth	11%	113	7%	88



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	45%	81	59%	106
Partner / spouse wanted to go	39%	74	48%	91
Festival or event	26%	95	29%	91
Kids wanted to go	22%	85	30%	94
Visiting friends / family	19%	94	26%	107
Special event (e.g., wedding, reunion)	16%	84	18%	96

**21%** 94  
INDEX SCORE

Travel aligns with  
children's school schedule

**40%** 101  
INDEX SCORE

Take time off for vacation  
during major holidays

**26%** 91  
INDEX SCORE

Difficult to take more than a  
few days of vacation at once



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- We are always thinking about our next trips, generally researching 2-3 months in advance, but we are booking more last minute.

# 66%

## Primary Trip Planner

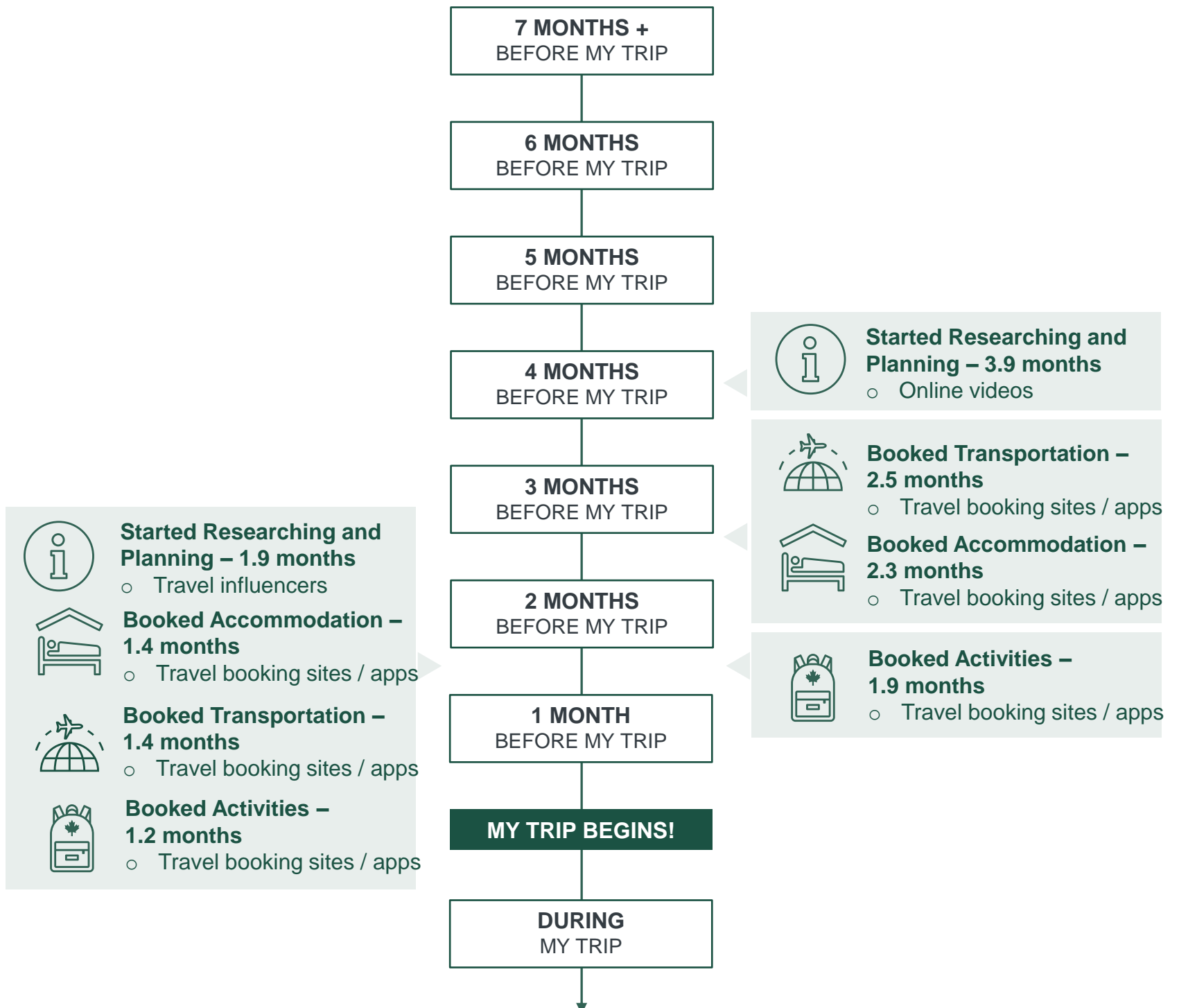
115  
INDEX SCORE

**!** **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
3–7 HOURS

FLIGHT OF  
7+ HOURS





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips are to adventure destinations or places known for peaceful access to nature.
- We also take trips like Culture Seekers or Refined Globetrotters.

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **SEGMENT ALIGNMENT** – The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**7%** 105 INDEX SCORE



TRIP TYPE	Adventure Destination		
COMPANIONS	Couple only		34%
	Extended family		22%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Novel & Authentic	Adventure
ACTIVITIES	Cultural or traditional festivals		26%
	Oceanside beaches		23%
	Spas		20%
KEY BEHAVIOURS	Adventure and excitement balanced with access to city amenities and pampering		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**10%** 122 INDEX SCORE



TRIP TYPE	Eco-Tourism Spot		
COMPANIONS	Couple only		36%
	Extended family		20%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		43%
	See or explore mountains		20%
	Oceanside beaches		20%
KEY BEHAVIOURS	Exploring beautiful scenery in a quiet and peaceful destination. Connecting with travel group		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**16%** 97 INDEX SCORE



TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		30%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Novel & Authentic
ACTIVITIES	Local restaurants		42%
	Street cuisine		24%
	Observing architecture		21%
KEY BEHAVIOURS	Seeking solitude to really learn something from a new culture. Might be visiting a friends in destination		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**6%** 98 INDEX SCORE



TRIP TYPE	Luxury Resort		
COMPANIONS	Extended family		39%
	Couple only		25%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants		50%
	Oceanside beaches		26%
	Spas		23%
KEY BEHAVIOURS	Upscale resort or lodge, focussed on reliable fun and relaxation with extended family		





# OUTDOOR EXPLORERS

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

- We seek access to adventure, wildlife and nature, and if it is remote and less-explored, even better!
- We travel internationally every 1-2 years, with a lot of travel to East Asia / Pacific countries.



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
South Korea	40%	92	China	4%	100
Japan	16%	82	Germany	4%	145
Vietnam	8%	108	UK	3%	144
US	5%	108	Singapore	3%	112
Philippines	4%	131	Australia	3%	108



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	45%	103
Provide access to unique natural wonders	37%	135
Provides opportunities to view wildlife in its natural habitat	22%	143
Provides numerous opportunities for outdoor adventures	21%	157
Offers options for adrenaline seekers	16%	152
Has many hidden gems	15%	142
Has a small town feel	11%	147
Provides a remote, no-frills experience	8%	141



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- If we have been to Canada before, there is a good chance it has been more than once.
- We overindex on visiting the Prairies, Territories, and Atlantic provinces.
- For future trips to Canada we are thinking first about major cities like Toronto and Vancouver.

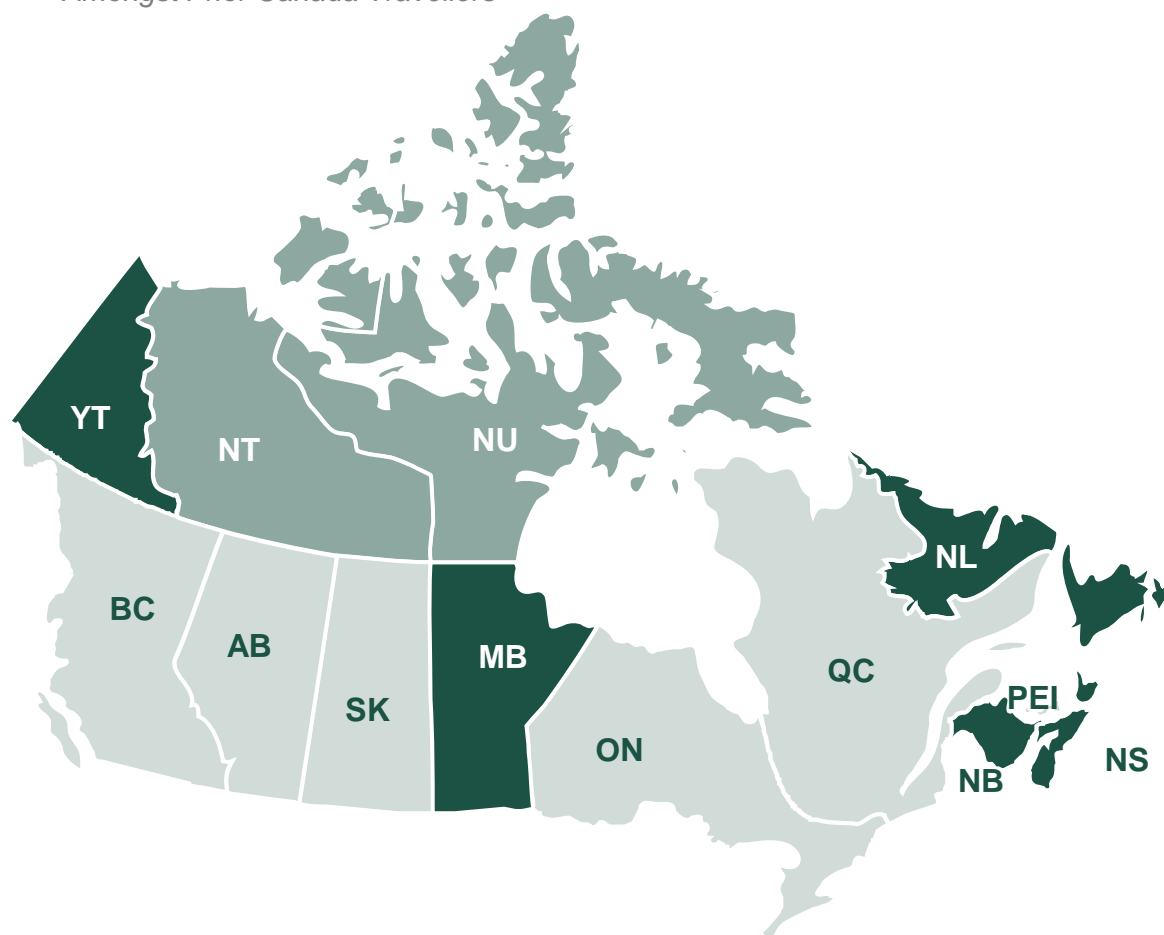


### WHERE DO WE WANT TO GO IN CANADA



### PROVINCES WE HAVE VISITED BEFORE

*Amongst Prior Canada Travellers*



PROVINCES	%	INDEX
AB	11%	102
BC	18%	79
MB	11%	125
NB	22%	138
NL	13%	133
NS	5%	128
NT	9%	118
NU	9%	117
ON	26%	96
PEI	2%	90
QC	36%	98
SK	5%	114
YT	7%	125



# OUTDOOR EXPLORERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- Our travel to Canada to date has been skewed towards the winter months.
- Our knowledge of Canada is average, some of us have done research thinking about future trips.



### CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
OUTDOOR EXPLORERS	25%	33%	30%	23%
VS. TOTAL MARKET	23%	30%	28%	30%

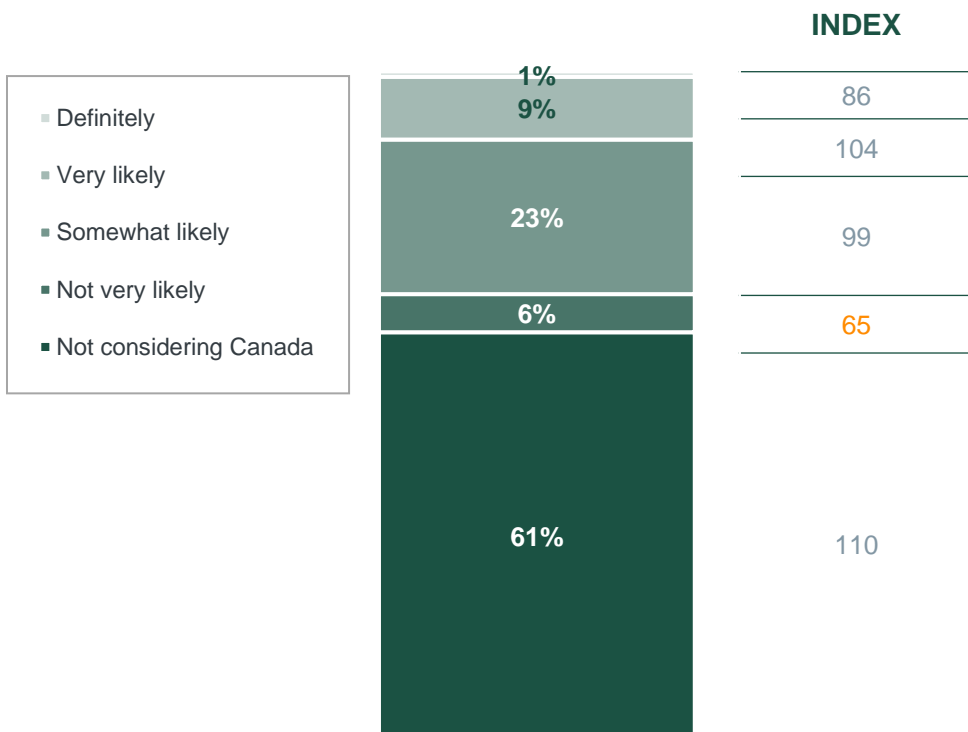
# 12%

Been to Canada in last 5 years

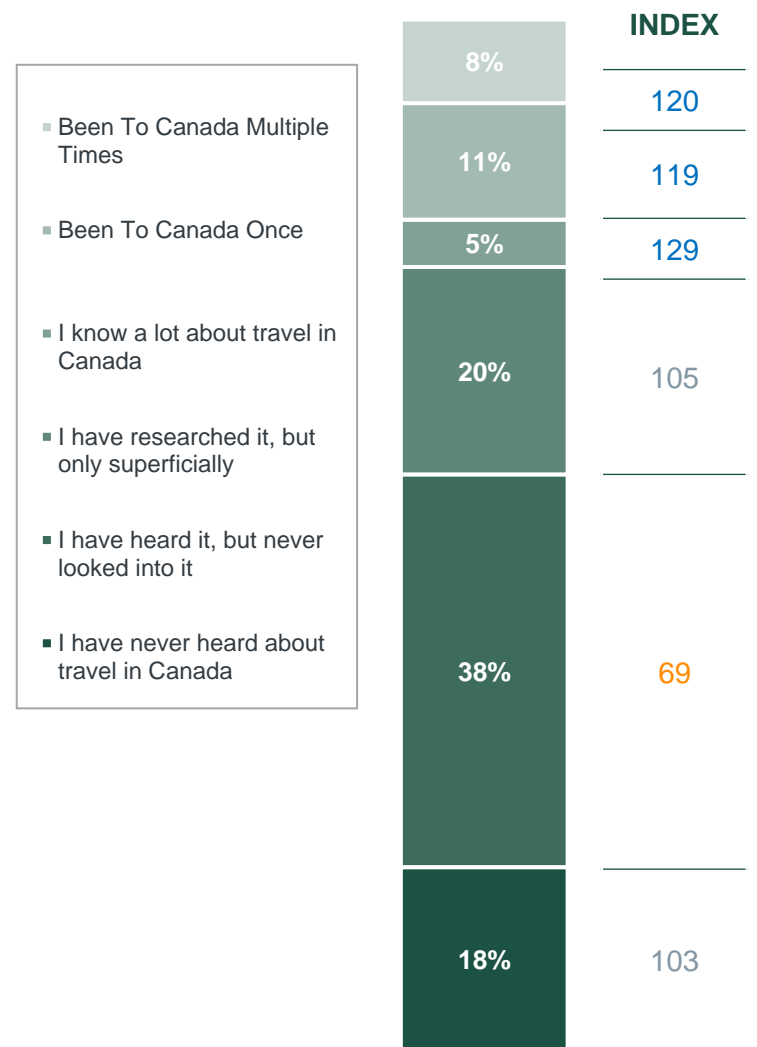
119 INDEX SCORE



### LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



### FAMILIARITY WITH CANADA







# OUTDOOR EXPLORERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

- Recent life events have included purchasing a new car or perhaps finding a new job.
- Beyond travel, our extra income is spent on personal hobbies and interests, including tech.



## MAJOR LIFE EVENTS IN LAST 5 YEARS

# 1%

Had a child

94 INDEX SCORE

# 28%

Started a new job / career

111 INDEX SCORE

# 12%

Bought a new home

85 INDEX SCORE

# 16%

Moved to a new city

87 INDEX SCORE

# 15%

Child started school

95 INDEX SCORE

# 39%

Purchased a car

106 INDEX SCORE

# 8%

Retired

105 INDEX SCORE

# 34%

Renovated house

78 INDEX SCORE



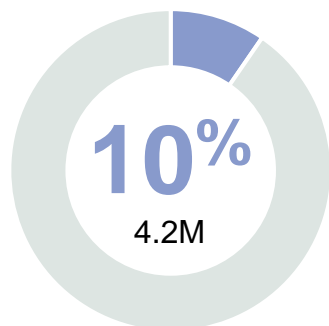
## NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	68%	97
Savings and investments	65%	93
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	49%	120
Personal care and wellness	43%	74
Fashion and accessories	27%	80
Technology and gadgets	20%	114



# CULTURE SEEKERS

PSYCHOGRAPHICS – SUMMARY



## % OF SOUTH KOREA POPULATION

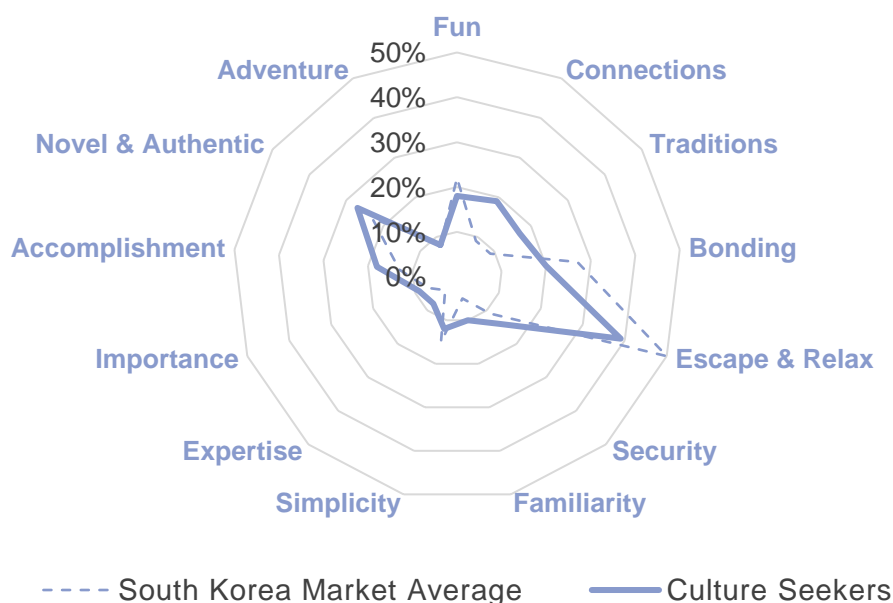
We are sociable, free-spirited individuals who seek unique, authentic experiences. We thrive on immersing ourselves in new perspectives, local culture, making connections, which boosts our energy and confidence.

We prefer vibrant city life, dynamic arts scenes, and culturally rich destinations. We prioritize diversity, inclusion, and sustainability, and open to both short and longer trips. Travel is an investment we make in ourselves.

### WHAT YOU NEED TO KNOW ABOUT ME

- 1 We prioritize diversity, inclusion, sustainability and supporting the local economy.
- 2 We like the challenge of a new experience, and are not afraid of trying something different like unconventional accommodations.
- 3 We try to learn the basics of the language before we travel so we can connect with new people and learn something new.
- 4 We like exploring without a strict plan, and get the most out of experiences that are flexible - though we do try to stay strict with our budgets.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

**128**

#### How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison



### TRAVELLER ECONOMIC INDEX

**115**

#### How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison



# CULTURE SEEKERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

- We seek new places and like the challenge of exploring something unconventional.
- We like to become familiar with our surroundings by participating in local traditions.
- We select destinations that are open and accepting, which aligns with our carefree and flexible nature.



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	77%	115
Exploring the world through travel is an important milestone of growing up	73%	115
I learn the basics of a language before visiting a country / region	66%	128
I enjoy the freedom of exploring new destinations without guided tours	66%	122
When I travel to natural environments it makes me reflect on how fortunate I am	65%	105
I try to keep a strict budget when I go on holiday	57%	117
I seek out destinations where I can explore my ancestral heritage	56%	122
When traveling, I expect 24 / 7 support from a travel provider	55%	114
I'm open to unconventional accommodations when travelling	43%	130
Generally I'm not influenced by what destinations are popular or trendy at the moment	40%	122
When travelling I often go to familiar restaurants, stores, and hotels that I recognize from home	38%	115
I go where I want to go, no matter the hurdles	34%	119
I like to keep my travel plans flexible and often book on short notice	31%	122



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To feel connected with new people	19%	136
To create new, or take part in old, traditions	18%	142
To feel like a local	13%	147
To push my limits and challenge myself	9%	130
To feel welcomed	9%	142
To feel like a travel expert	8%	125



## DESIRED DESTINATION

	SCORE	INDEX
Open	38%	148
Free-Spirited	31%	128
Caring	26%	132
Accepting	21%	142
Passionate	21%	131
Sociable	12%	142



# CULTURE SEEKERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We represent a diverse age range, and a variety of family stages.
- We are working full-time or are self employed, and earn a range of incomes.



### AGE

	SCORE	INDEX
18-34	26%	107
35-54	42%	102
55+	32%	92
MEAN YEARS	46.0	91



### HH INCOME (CAD)\*

	SCORE	INDEX
Less than \$2.5K	21%	99
\$2.5K to <\$8K	67%	108
\$8K or more	9%	101
Refused	3%	79

\* HH Income reported by month



### EMPLOYMENT

	SCORE	INDEX
Employed FT	60%	117
Employed PT	7%	100
Self-employed	12%	102
Retired	6%	87



### EDUCATION

	SCORE	INDEX
Primary education or less	1%	103
Secondary education	15%	91
Post-secondary education	84%	108



**80%**

118 Have a valid passport



### GENDER

**61%**

126 Male

**39%**

74 Female

**0%**

Non-binary / Other



### HOUSEHOLD

**35%**

103 Children <18 Living At Home\*

**22%**

91 Children 18+ Living At Home\*

**10%**

87 Children NOT Living At Home\*

**55%**

100 No Children

\* Option is not exclusive



## SOUTH KOREA CITY BREAKOUT

	SCORE	INDEX
Gyeonggi-do	28%	72
Seoul	22%	107
Gyeongsangnam-do	8%	110
Gyeongsangbuk-do	7%	108
Busan	5%	104
Chungcheongnam-do	5%	104

	SCORE	INDEX
Daegu	4%	119
Chungcheongbuk-do	4%	89
Jeollabuk-do	4%	97
Daejeon	3%	125
Jeollanam-do	3%	85



# CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL HABITS

## TRAVEL TRADE INDEX: NON-GROUP

88

## TRAVEL TRADE INDEX: GROUP

99

### ! KEY terminology on this page

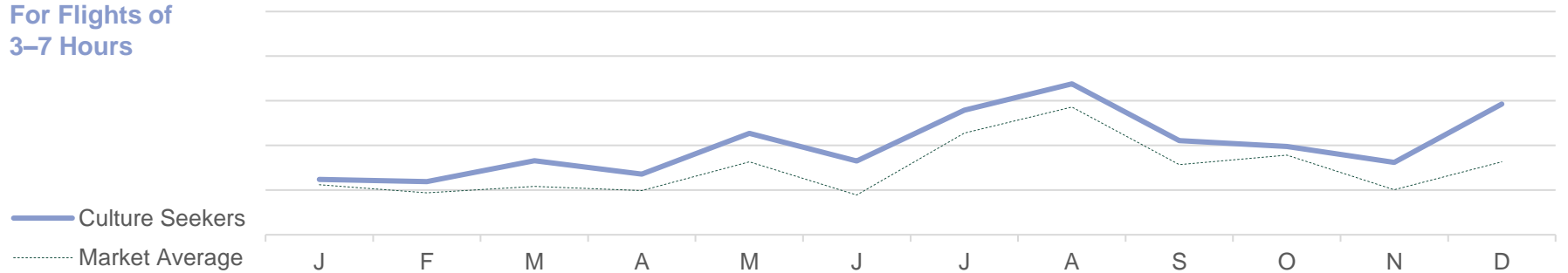
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP** – The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

For additional definitions see [Glossary](#)

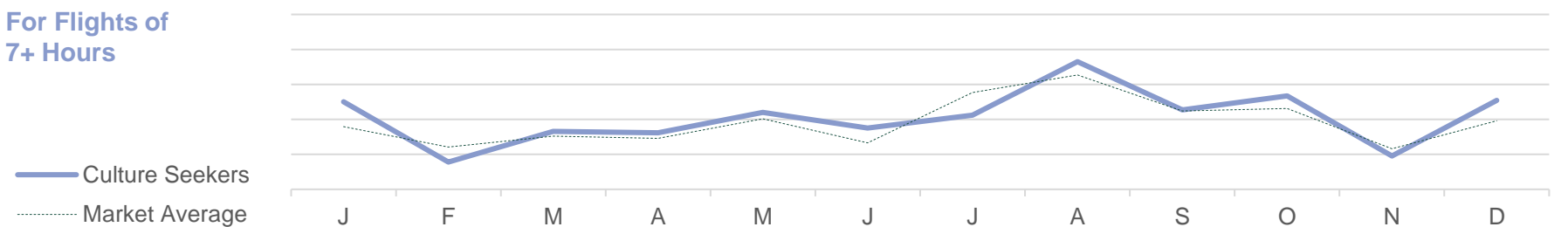


## TYPICAL TRAVEL MONTHS

### For Flights of 3–7 Hours



### For Flights of 7+ Hours



## TRIP DURATION

INDEX

1-2 Days	51%	88
3-5 Days	33%	118
1 Week Holiday	15%	129
2 Weeks Holiday	5%	119
3 Weeks Or More	6%	132

*Incidence is frequency of 2+ times per year*



## TRIP TYPE

INDEX

Domestic Leisure	56%	82
International Leisure	26%	127
Business Trip	26%	144
Added Personal To Business	15%	142
Worked During Vacation	10%	134

*Incidence is frequency of 2+ times per year*





# CULTURE SEEKERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	59%	106
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	24%	92
Premium Hotel	16%	96
All-inclusive resort	14%	93
Vacation Rental (e.g., Airbnb, Vrbo)	14%	117
Hostel	11%	149



## THOUGHTS ON INDIGENOUS TRAVEL

# 61%

126 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

# 8%

92 INDEX SCORE

Strong Interest In Indigenous Activities



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	79%	124
You only ever get to know a country by experiencing its culture	70%	119
I'm willing to put in the effort while travelling in order to see lesser-known places	54%	127
I like to explore places that are off the beaten path and less explored	44%	118
I'm open to visiting destinations with challenging climates or weather conditions	34%	133
I'm open to travelling to destinations with limited tourist infrastructure	29%	122



# CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

- We are frequent solo travellers, and also travel with our partner.
- Our budgets are usually mid-ranged, and we consider our budgets when planning.



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	51%	85
Adult relatives	22%	77
Solo	22%	139
Kids	16%	96
Friends	15%	99



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

# \$2,790

115  
INDEX SCORE

### SPEND STYLE

Premium / Upscale



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	77%	136
I consider the impact that I personally have on the destinations I visit	69%	141
Hearing from underrepresented communities is an important part of travelling	62%	140
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	55%	119
It's important for me to know that the money I spend will support the local economy I'm visiting	45%	129

# 68%

## PRIORITIZE SUSTAINABLE TRAVEL

117 INDEX SCORE

! **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIORITIZE SUSTAINABLE TRAVEL** – The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."



# CULTURE SEEKERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES



## OVERALL INSIGHT

- We explore and immerse in destinations through food and local festivals.
- For some trips we enjoy nightlife or may try some seasonal sports that are novel to us.



## TOP DESIRED TRAVEL ACTIVITIES

		SCORE	INDEX
Local cuisine <ul style="list-style-type: none"> <li>○ Street cuisine</li> <li>○ Cafes or bakeries</li> <li>○ Wineries</li> </ul>		60%	94
		35%	97
		24%	91
		11%	116
Festivals and events <ul style="list-style-type: none"> <li>○ Cultural or traditional festivals</li> <li>○ Music concerts or festivals</li> </ul>		44%	126
		28%	119
		20%	114
Nightlife <ul style="list-style-type: none"> <li>○ Bars and pubs</li> <li>○ Clubs and dancing</li> </ul>		17%	119
		10%	109
		9%	141
Winter-based sports <ul style="list-style-type: none"> <li>○ Dog-sledding</li> <li>○ Ice skating or hockey</li> </ul>		8%	109
		3%	144
		2%	118
Cultural experiences or attractions <ul style="list-style-type: none"> <li>○ Historical or archeological sites</li> <li>○ History or culture lessons</li> </ul>		56%	98
		28%	92
		20%	123
High-intensity sports		8%	121
Shopping		34%	95
Health and wellness		34%	77
Nature experiences		31%	64
Guided tours		23%	97
Family-focused attractions		24%	90
Casual sports		13%	106



# CULTURE SEEKERS

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To escape from routine	54%	78	53%	93
To relax and unwind	51%	99	57%	116
To spend time with family	39%	82	45%	77
To be pampered	35%	112	29%	92
To check off dream travel places	31%	114	21%	106
To learn through other cultures	20%	95	23%	111
To have fun with friends	13%	96	21%	115
For personal reflection and growth	10%	106	11%	106
To seek solitude and isolation	17%	132	8%	116



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	44%	79	50%	71
Partner / spouse wanted to go	41%	80	35%	69
Festival or event	32%	113	47%	140
Kids wanted to go	33%	98	28%	92
Visiting friends / family	29%	145	37%	142
Work dictates destinations	31%	139	36%	140

**28%** 106  
INDEX SCORE

Travel aligns with  
children's school schedule

**40%** 100  
INDEX SCORE

Take time off for vacation  
during major holidays

**28%** 100  
INDEX SCORE

Difficult to take more than a  
few days of vacation at once



# CULTURE SEEKERS

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- We plan a few months in advance, but book closer to travel. Our shorter distance trips are influenced by online videos and recommendations from friends

# 70%

### Primary Trip Planner

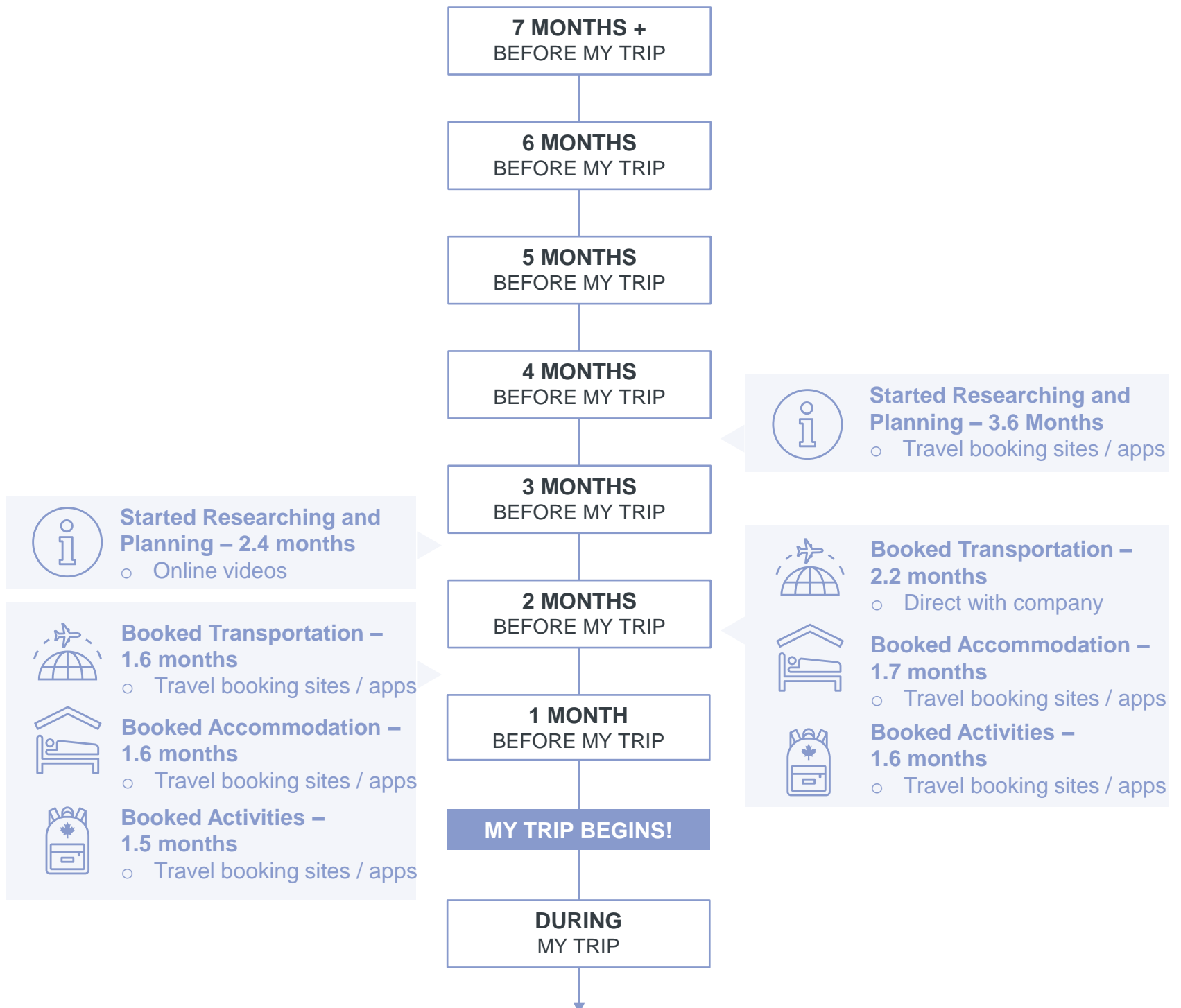
129  
INDEX SCORE

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
3–7 HOURS

FLIGHT OF  
7+ HOURS







# CULTURE SEEKERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips enjoy the culture, food, music, and shopping of a destination.
- We also take trips like Outdoor Explorers or Simplicity Lovers.

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **SEGMENT ALIGNMENT** – The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**21%** 114 INDEX SCORE



TRIP TYPE	Solo Trip		
DESTINATION TYPE	Urban centre		30%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Novel & Authentic
ACTIVITIES	Local restaurants		42%
	Street cuisine		24%
	Observing architecture		21%
KEY BEHAVIOURS	Seeking solitude to really learn something from a new culture. Might be visiting a friends in destination		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**7%** 103 INDEX SCORE



TRIP TYPE	Food & Wine Capital		
COMPANIONS	Couple only		29%
	Alone		26%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Accomplishment
ACTIVITIES	Local restaurants		54%
	Street cuisine		43%
	Luxury dining		22%
KEY BEHAVIOURS	Moderate accommodations while splurging on culinary experiences		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**15%** 95 INDEX SCORE



TRIP TYPE	Friends Trip		
DESTINATION TYPE	Beach resort		20%
	Small cities and town		14%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		39%
	See or explore mountains		13%
	Oceanside beaches		13%
KEY BEHAVIOURS	Letting loose and having fun with friends in a more relaxed locale with beautiful scenery		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**11%** 117 INDEX SCORE



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only		36%
	Extended family		30%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants		66%
	Oceanside beaches		32%
	Nature walks		15%
KEY BEHAVIOURS	Peaceful destination away from crowds. Low impact activities. Maybe staying in a lodge		



# CULTURE SEEKERS

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

- We seek rich culture and heritage, with attractions, festivals and events to explore.
- We travel domestically, but also internationally, exploring Europe and the Americas.



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
South Korea	31%	74	Philippines	4%	128
Japan	21%	117	Australia	4%	136
Vietnam	7%	86	Switzerland	3%	136
China	5%	120	France	2%	127
US	5%	108	Italy	2%	117



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Has a rich cultural and historical heritage	38%	118
Is inclusive and tolerant	35%	142
Provides a variety of local festivals and events	31%	139
Offers an eccentric and unique atmosphere	29%	127
Offers an energetic and dynamic cultural scene	28%	142
Has a thriving arts and music scene	18%	146
Has vibrant nightlife and entertainment	17%	148
Has many hidden gems	12%	121



# CULTURE SEEKERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- We are more likely to have visited Canada than other segments in South Korea.
- We overindex on propensity to visit most areas in Canada.
- A future visit could include Toronto, Vancouver, or Quebec.

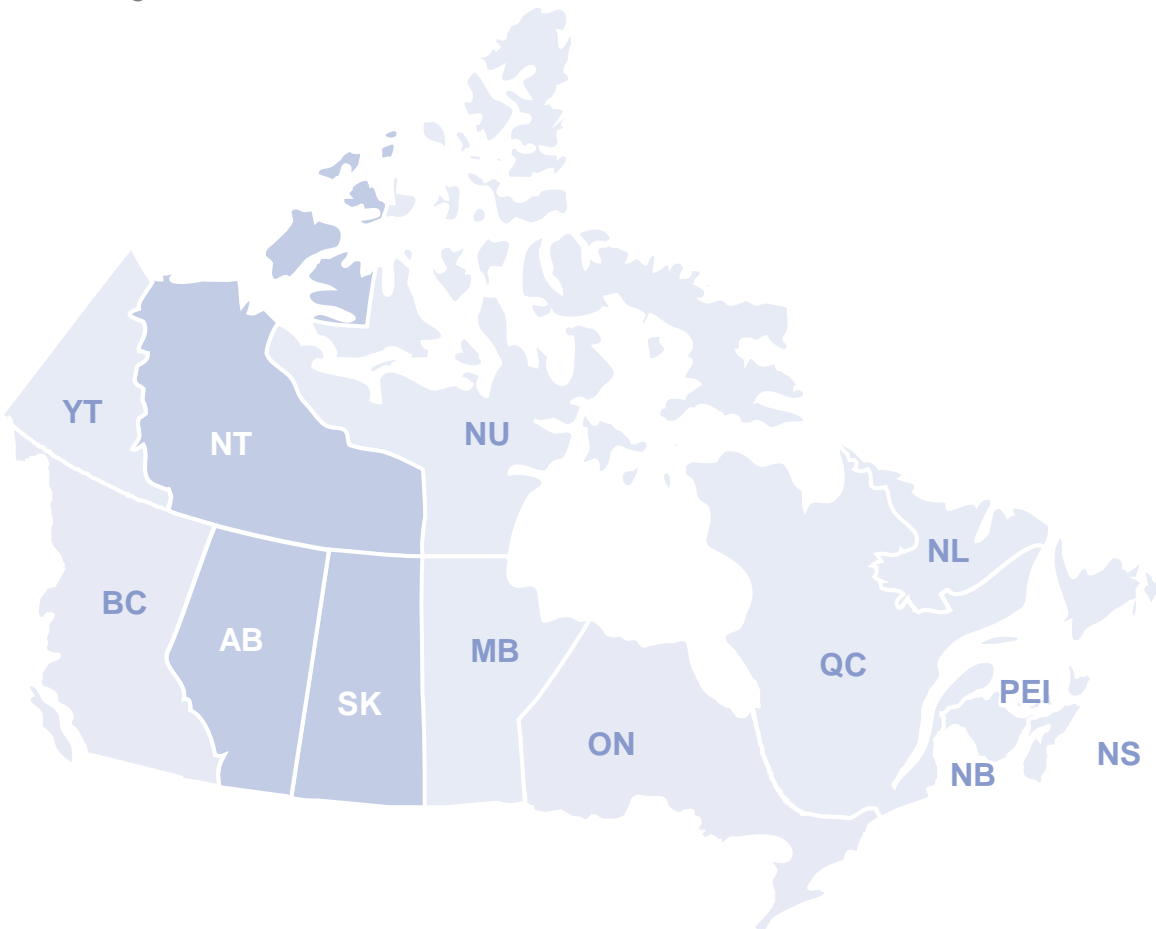


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	14%	116
BC	26%	99
MB	9%	113
NB	12%	105
NL	9%	113
NS	2%	87
NT	9%	118
NU	9%	115
ON	24%	91
PEI	3%	103
QC	43%	108
SK	6%	117
YT	3%	94



# CULTURE SEEKERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- Most travel to Canada has been during the winter and spring months.
- Overall, our knowledge of Canada as a travel destination is relatively strong, and we are considering a visit in the future.



## CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CULTURE SEEKERS	30%	35%	20%	25%
VS. TOTAL MARKET	23%	30%	28%	30%

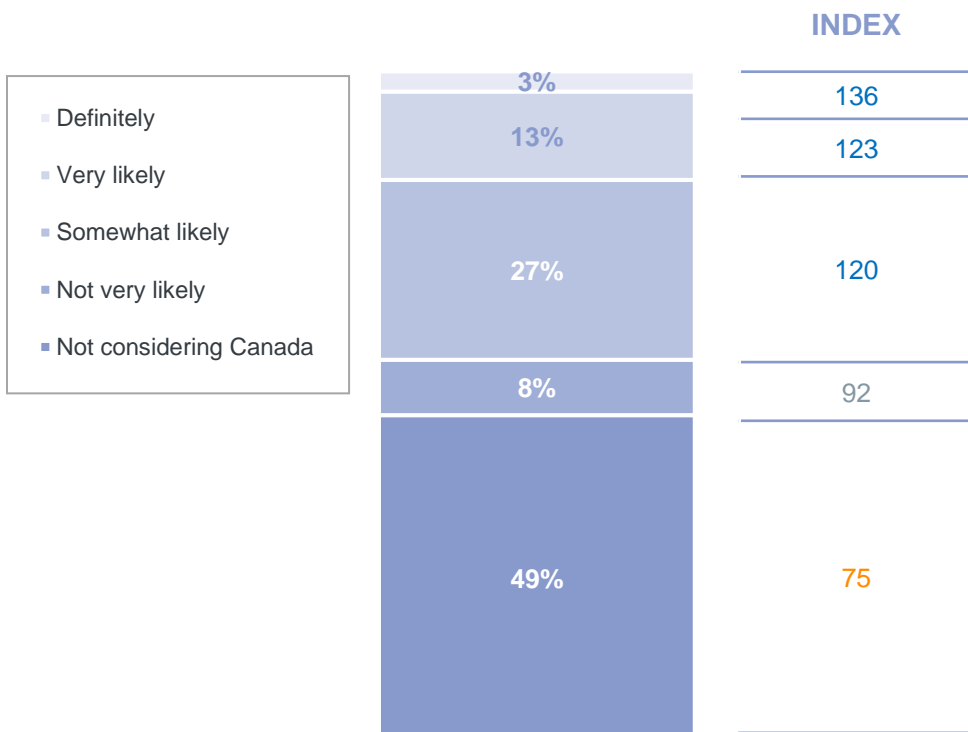
# 13%

Been to Canada in last 5 years

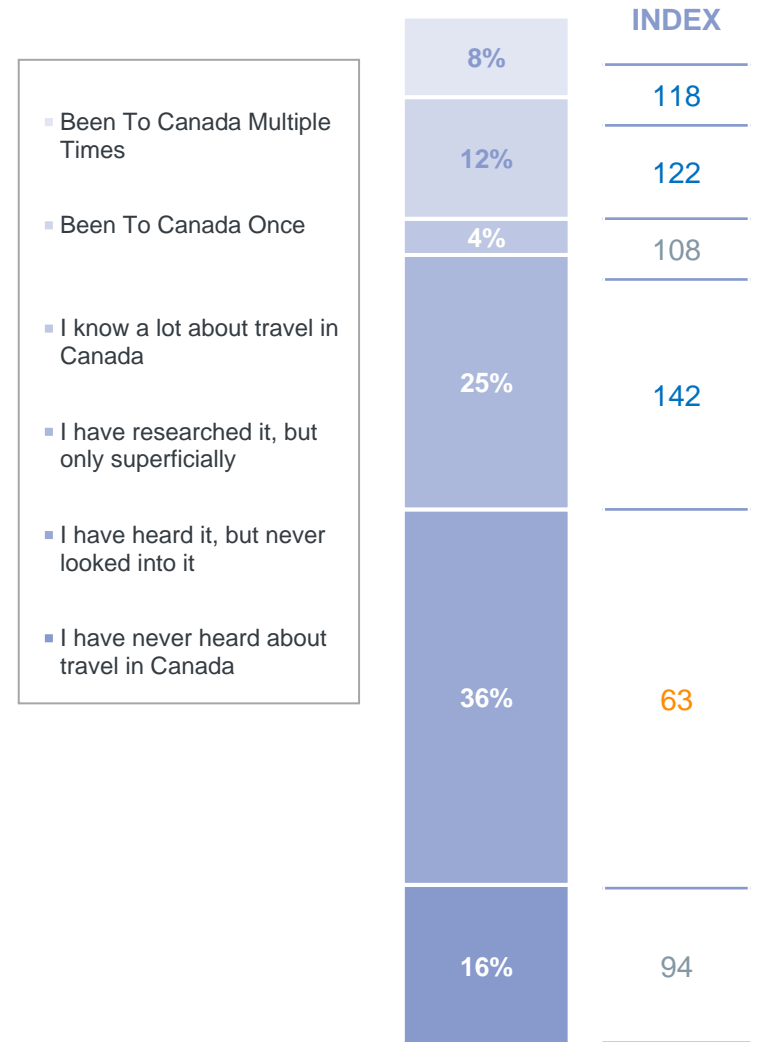
125 INDEX SCORE



## LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



## FAMILIARITY WITH CANADA





# CULTURE SEEKERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

- Beyond travel, our extra income is spent on personal interests, including fashion, hobbies, experiences, and technology.
- In the last 5 years, we have purchased a new car and invested in home renovations.



## MAJOR LIFE EVENTS IN LAST 5 YEARS

# 2%

Had a child

95 INDEX SCORE

# 27%

Started a new job / career

102 INDEX SCORE

# 16%

Bought a new home

96 INDEX SCORE

# 17%

Moved to a new city

100 INDEX SCORE

# 17%

Child started school

99 INDEX SCORE

# 37%

Purchased a car

99 INDEX SCORE

# 5%

Retired

79 INDEX SCORE

# 45%

Renovated house

126 INDEX SCORE



## NON-ESSENTIAL SPENDING PRIORITIES

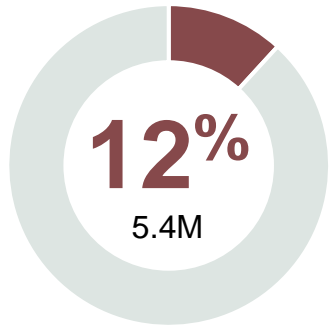
	SCORE	INDEX
Travel	64%	79
Savings and investments	60%	72
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	50%	125
Personal care and wellness	43%	70
Fashion and accessories	30%	97
Technology and gadgets	22%	127





# REFINED GLOBETROTTERS

PSYCHOGRAPHICS – SUMMARY



## % OF SOUTH KOREA POPULATION

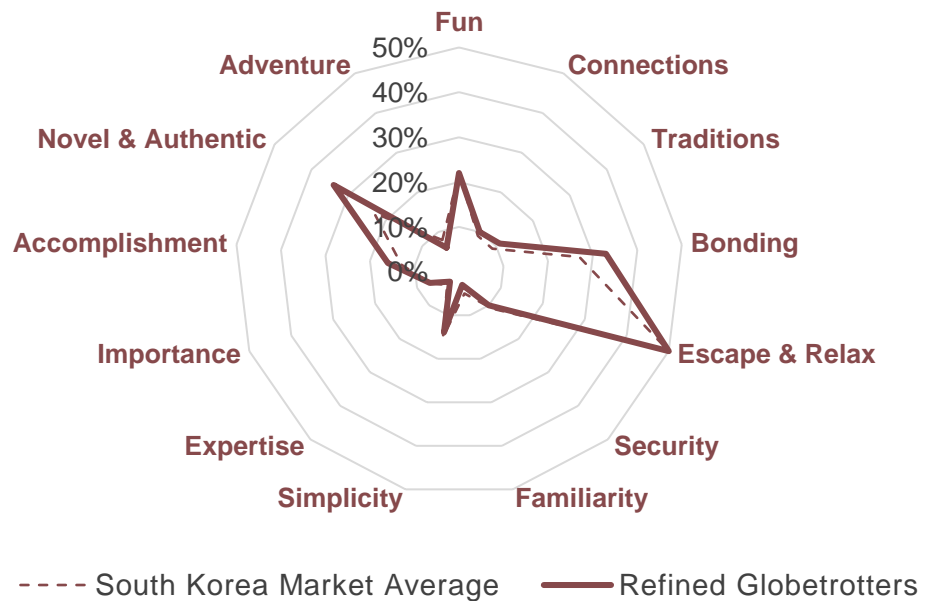
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross off our list.

We immerse ourselves in history, museums, and seek to learn something new from the cultures we experience. We ensure smooth travel with all-inclusive packages and expert-guided tours.

### WHAT YOU NEED TO KNOW ABOUT ME

- 1 Travel is our #1 spending priority.
- 2 We have the flexibility to travel at any time of year.
- 3 We are looking for world-class and curated experiences in all aspects from dining and shopping to accommodation.
- 4 Being open to new perspectives and learning about new cultures is important part of our travels.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

**111**

#### How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison



### TRAVELLER ECONOMIC INDEX

**133**

#### How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison



# REFINED GLOBETROTTERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

- We seek discovery through experiences, and a sense of accomplishment through our travels.
- We want to experience luxury and indulge in world-class experiences, and tend not to think about budget.
- Joining tours and working with travel agents ensures a smooth, enlightening travel experience.



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with well-established tourist infrastructure	88%	125
I prefer booking flights and accommodations well in advance	86%	123
I like to come back from travels having learnt something new	81%	126
I'm always on the lookout for new destinations to visit next	80%	131
Exploring the world through travel is an important milestone of growing up	80%	134
I make sure to visit the "famous" sites wherever I go	71%	136
When traveling, I expect 24 / 7 support from a travel provider	61%	140
I enjoy joining guided tours to explore new destinations	58%	149
While I think about value for money, it doesn't tend to influence my choice of destination	56%	133
I tend to not think about my budget too much when travelling	54%	137
Luxury experiences are an important part of travel	49%	130
I seek travel advice from travel agencies and agents	48%	140
I seek out fine dining experiences and gourmet cuisine when I travel	33%	135



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	42%	136
To bond through shared experiences	33%	127
To open my mind to new perspectives	33%	130
To have authentic experiences	26%	120
To feel like I've accomplished something	22%	120
To indulge myself and live in the moment	16%	116



## DESIRED DESTINATION

	SCORE	INDEX
Charming	65%	139
World-Class	35%	151
Unique	33%	138
Luxurious	31%	152
Authentic	15%	114
Exclusive	9%	128



# REFINED GLOBETROTTERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We are employed full time, and some of us are retired.
- We have higher incomes or are financially comfortable in retirement.
- If we are parents, our kids are entering their teen years, or perhaps not living with us any longer.



### AGE

	SCORE	INDEX
18-34	11%	75
35-54	36%	94
55+	53%	125
MEAN YEARS	53.3	132



### HH INCOME (CAD)\*

	SCORE	INDEX
Less than \$2.5K	10%	53
\$2.5K to <\$8K	70%	131
\$8K or more	16%	147
Refused	4%	107

\* HH Income reported by month



### EMPLOYMENT

	SCORE	INDEX
Employed FT	56%	91
Employed PT	8%	119
Self-employed	14%	129
Retired	11%	117



### EDUCATION

	SCORE	INDEX
Primary education or less	1%	87
Secondary education	12%	79
Post-secondary education	87%	121



**87%**

134 Have a valid passport



### GENDER

**52%**

91 Male

**48%**

109 Female

**0%**

Non-binary / Other



### HOUSEHOLD

**27%**

95 Children <18 Living At Home\*

**38%**

127 Children 18+ Living At Home\*

**17%**

118 Children NOT Living At Home\*

**56%**

101 No Children

\* Option is not exclusive



## SOUTH KOREA CITY BREAKOUT

	SCORE	INDEX
Gyeonggi-do	32%	102
Seoul	24%	127
Busan	7%	128
Gyeongsangnam-do	7%	83
Chungcheongbuk-do	5%	111
Jeollabuk-do	3%	88

	SCORE	INDEX
Chungcheongnam-do	3%	88
Jeollanam-do	3%	88
Incheon	3%	106
Gwangju	2%	109
Gyeongsangbuk-do	2%	63



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL HABITS

## TRAVEL TRADE INDEX: NON-GROUP

142

## TRAVEL TRADE INDEX: GROUP

138

**!** KEY terminology on this page

- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP** – The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

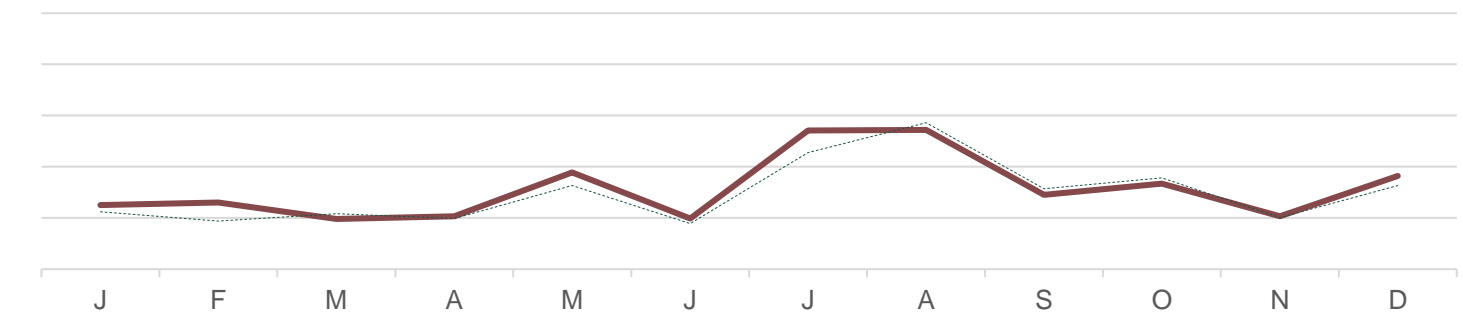
For additional definitions see [Glossary](#)



### TYPICAL TRAVEL MONTHS

**For Flights of 3–7 Hours**

— Refined Globetrotters  
 - - - Market Average



**For Flights of 7+ Hours**

— Refined Globetrotters  
 - - - Market Average



### TRIP DURATION

INDEX

1-2 Days	63%	133
3-5 Days	37%	131
1 Week Holiday	14%	125
2 Weeks Holiday	5%	115
3 Weeks Or More	3%	100

*Incidence is frequency of 2+ times per year*



### TRIP TYPE

INDEX

Domestic Leisure	71%	135
International Leisure	26%	128
Business Trip	17%	94
Added Personal To Business	7%	97
Worked During Vacation	5%	103

*Incidence is frequency of 2+ times per year*



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	54%	86
Premium Hotel	35%	148
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	26%	98
All-inclusive resort	18%	115
Bed & Breakfast	12%	88
Vacation Rental (e.g., Airbnb, Vrbo)	7%	74



## THOUGHTS ON INDIGENOUS TRAVEL

# 48%

107 INDEX SCORE

**I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit**

# 19%

142 INDEX SCORE

**Strong Interest In Indigenous Activities**



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	79%	125
You only ever get to know a country by experiencing its culture	76%	132
I'm willing to put in the effort while travelling in order to see lesser-known places	43%	103
I like to explore places that are off the beaten path and less explored	22%	79
I'm open to visiting destinations with challenging climates or weather conditions	18%	90
I'm open to travelling to destinations with limited tourist infrastructure	12%	75





# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

- We travel primarily with our partner/spouse as well as extended family/group of friends.
- Our budgets are healthy, as travel is our priority.



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	65%	113
Adult relatives	34%	120
Friends	15%	102
Kids	15%	95
Solo	5%	81



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

# \$3,190

133  
INDEX SCORE

### SPEND STYLE

Premium to High-end Luxury



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	67%	112
I consider the impact that I personally have on the destinations I visit	51%	100
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	45%	103
Hearing from underrepresented communities is an important part of travelling	42%	104
It's important for me to know that the money I spend will support the local economy I'm visiting	29%	98

# 68%

## PRIORITIZE SUSTAINABLE TRAVEL

117 INDEX SCORE

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIORITIZE SUSTAINABLE TRAVEL** – The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES



## OVERALL INSIGHT

- Local and luxury in both cuisine and shopping are a priority.
- We like to explore historical sites and local culture, and enjoy unique overnight experiences.



## TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
<b>Local cuisine</b> <ul style="list-style-type: none"> <li>○ Local restaurants</li> <li>○ Street cuisine</li> <li>○ Luxury dining</li> </ul>	74%	115
	62%	112
	42%	113
	31%	140
<b>Cultural experiences or attractions</b> <ul style="list-style-type: none"> <li>○ Historical or archeological sites</li> <li>○ Museums</li> </ul>	68%	126
	48%	140
	42%	129
<b>Health and wellness</b> <ul style="list-style-type: none"> <li>○ Spas</li> <li>○ Outdoor hot tub or bath</li> </ul>	48%	132
	33%	133
	30%	132
<b>Guided tours</b> <ul style="list-style-type: none"> <li>○ City tours</li> <li>○ Wildlife or nature tours</li> </ul>	37%	150
	23%	144
	22%	142
<b>Overnight experiences</b> <ul style="list-style-type: none"> <li>○ Staying at all-inclusive resort</li> <li>○ Cruise</li> </ul>	19%	122
	12%	143
	8%	134
<b>Nature experiences</b>	52%	123
<b>Shopping</b>	39%	105
<b>Family-focused attractions</b>	33%	100
<b>Festivals and events</b>	28%	86
<b>Casual sports</b>	9%	88
<b>Nightlife</b>	8%	88
<b>Water-based sports</b>	6%	85



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	58%	106	67%	107
To relax and unwind	48%	92	53%	106
To escape from routine	59%	90	52%	90
To be pampered	23%	79	31%	97
To learn through other cultures	27%	129	24%	112
To check off dream travel places	29%	112	21%	106
To have fun with friends	11%	90	11%	82
To have memories from top travel spots	15%	106	12%	92
For personal reflection and growth	10%	107	13%	115



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	61%	108	61%	111
Partner / spouse wanted to go	56%	124	65%	121
Kids wanted to go	37%	104	42%	107
Festival or event	27%	97	31%	98
Special event (e.g., wedding, reunion)	21%	109	21%	101
Visiting friends / family	18%	92	19%	88

**23%** 98  
INDEX SCORE

Travel aligns with  
children's school schedule

**40%** 103  
INDEX SCORE

Take time off for vacation  
during major holidays

**21%** 69  
INDEX SCORE

Difficult to take more than a  
few days of vacation at once



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- We book on average just a couple of months ahead, and plan with a variety of resources.

# 65%

**Primary Trip Planner**

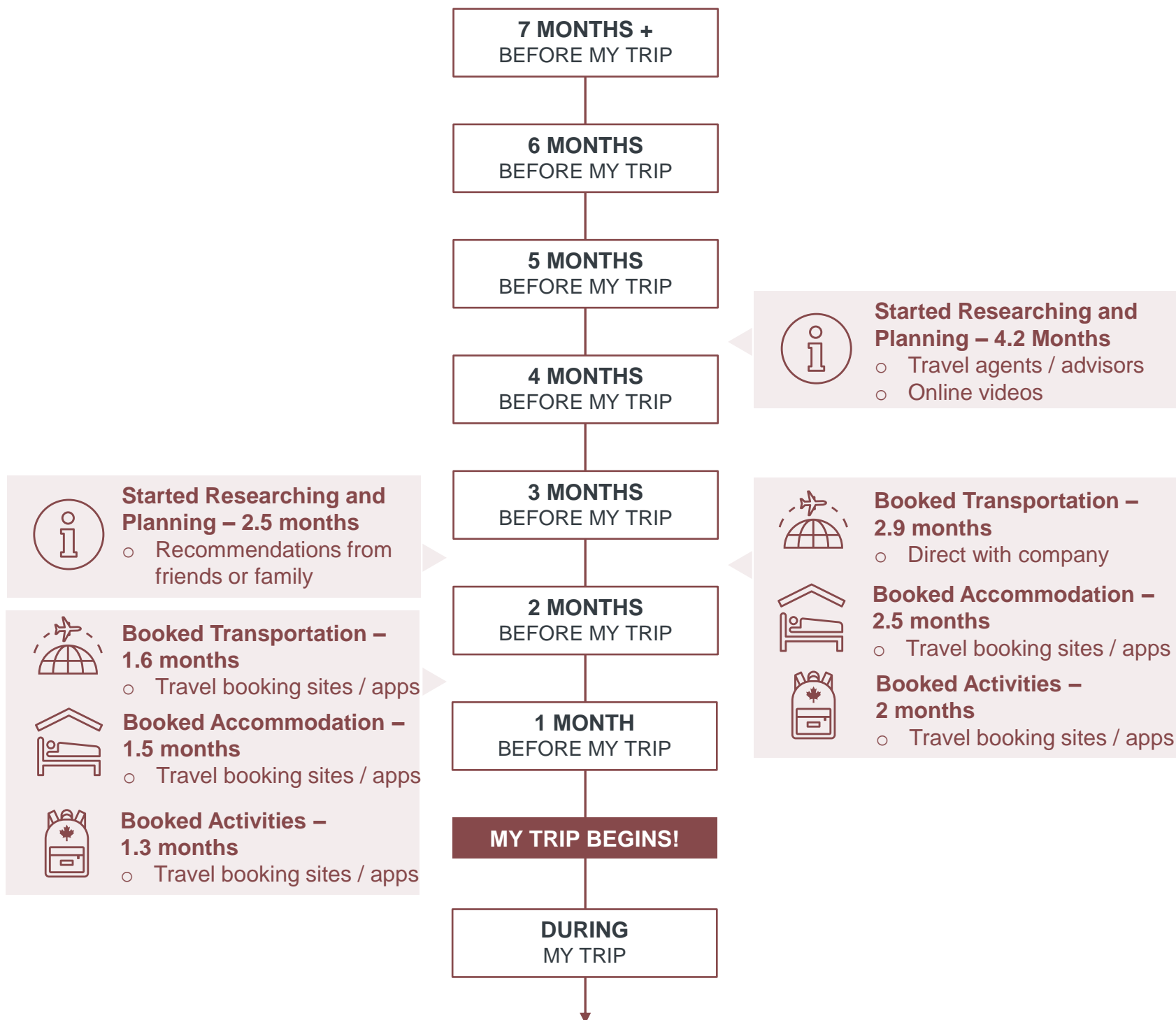
113  
INDEX SCORE

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
**3–7 HOURS**

FLIGHT OF  
**7+ HOURS**





# REFINED GLOBETROTTERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips explore luxury and world renowned destinations.
- We also take trips like Simplicity Lovers or City Trippers.

**!** **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **SEGMENT ALIGNMENT** – The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**14%** 135 INDEX SCORE



TRIP TYPE	Cultural Experience		
COMPANIONS	Couple only		35%
	Extended family		35%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
	Local restaurants		58%
	Historical or archeological sites		31%
ACTIVITIES	Street cuisine		25%
	KEY BEHAVIOURS: A scenic destination with lots of opportunities for sightseeing and spending time with family outdoors		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**9%** 109 INDEX SCORE



TRIP TYPE	Historical Site		
COMPANIONS	Couple only		41%
	Escape & Relax	Fun	Novel & Authentic
ACTIVITIES	Historical or archeological sites		67%
	Observing architecture		52%
	Religious buildings or sites		52%
KEY BEHAVIOURS	Likely a couples trip to a bucket-list destination known for its history. Want to learn about the world		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**7%** 102 INDEX SCORE



TRIP TYPE	Island Getaway		
COMPANIONS	Extended family		43%
	Escape & Relax	Fun	Simplicity
ACTIVITIES	Oceanside beaches		57%
	Local restaurants		46%
	Nature walks		19%
KEY BEHAVIOURS	Larger family group to a charming and safe destination. Perhaps staying in a cabin or lodge		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**17%** 154 INDEX SCORE



TRIP TYPE	Urban Centre		
COMPANIONS	Extended family		32%
	Couple only		31%
ACTIVITIES	Escape & Relax	Fun	Simplicity
	Local restaurants		69%
	Cafes or bakeries		42%
KEY BEHAVIOURS	Visiting famous shopping centres		34%
	All about fun, and needs to be easy to get to. Shopping and dining on a budget		







# REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- We are more likely than others to have been to Canada before, but perhaps not recently.
- We are most likely to have visited Ontario and Quebec and over index with Prince Edwards Island.
- Future trips to Canada could still include a variety of provinces and destinations.



## WHERE DO WE WANT TO GO IN CANADA

VANCOUVER YELLOWKNIFE OTTAWA  
 ROCKY MOUNTAINS CALGARY GREAT LAKES WEST  
 NOTRE DAME TORONTO SCARBOROUGH  
 BANFF STANLEY PARK NIAGARA ONTARIO  
 MONTREAL PRINCE EDWARD ISLAND QUEBEC  
 CENTRAL REGION



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	13%	111
BC	25%	97
MB	6%	99
NB	5%	84
NL	4%	85
NS	3%	106
NT	4%	88
NU	6%	95
ON	32%	109
PEI	4%	130
QC	39%	103
SK	3%	92
YT	5%	108



# REFINED GLOBETROTTERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- We are most likely to have visited in the summer into early fall months.
- Overall we have some knowledge of Canada, and are likely to consider a trip in the future.



### CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	15%	25%	33%	39%
VS. TOTAL MARKET	23%	30%	28%	30%

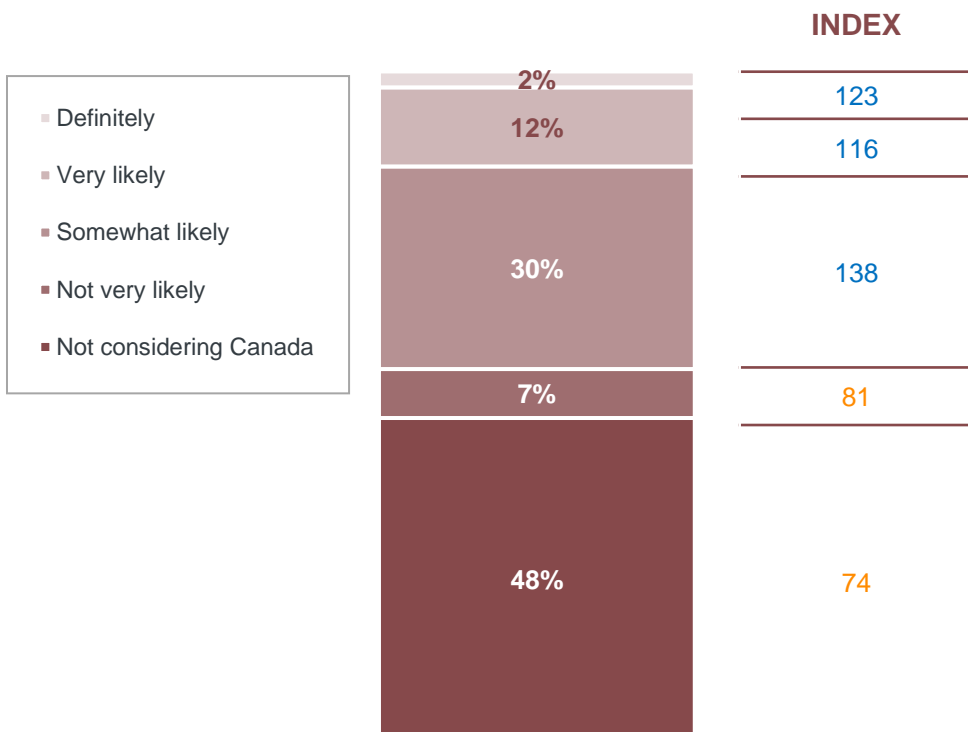
# 12%

Been to Canada in last 5 years

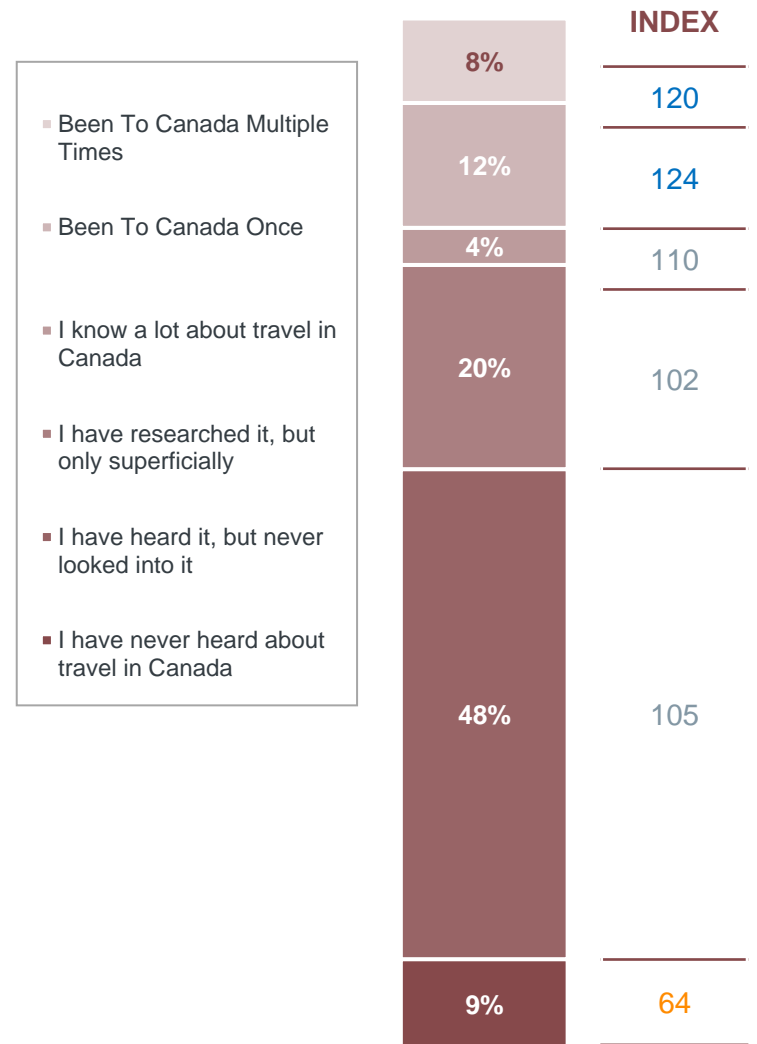
118 INDEX SCORE



### LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



### FAMILIARITY WITH CANADA





# REFINED GLOBETROTTERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

- Recent larger expenses include investing in a new car and renovating our homes.
- After spending on travel, our next biggest priority is continuing to grow our savings.



## MAJOR LIFE EVENTS IN LAST 5 YEARS

# 2%

Had a child

97 INDEX SCORE

# 23%

Started a new job / career

78 INDEX SCORE

# 18%

Bought a new home

101 INDEX SCORE

# 16%

Moved to a new city

92 INDEX SCORE

# 15%

Child started school

95 INDEX SCORE

# 43%

Purchased a car

126 INDEX SCORE

# 11%

Retired

128 INDEX SCORE

# 41%

Renovated house

110 INDEX SCORE



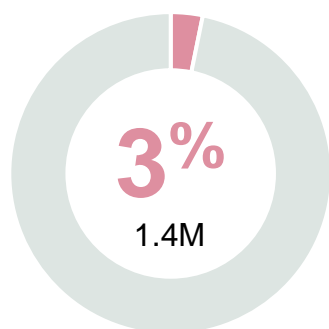
## NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Travel	77%	151
Savings and investments	65%	90
Personal care and wellness	52%	128
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	37%	77
Fashion and accessories	30%	99
Technology and gadgets	17%	94



# PURPOSE DRIVEN FAMILIES

PSYCHOGRAPHICS – SUMMARY



## % OF SOUTH KOREA POPULATION

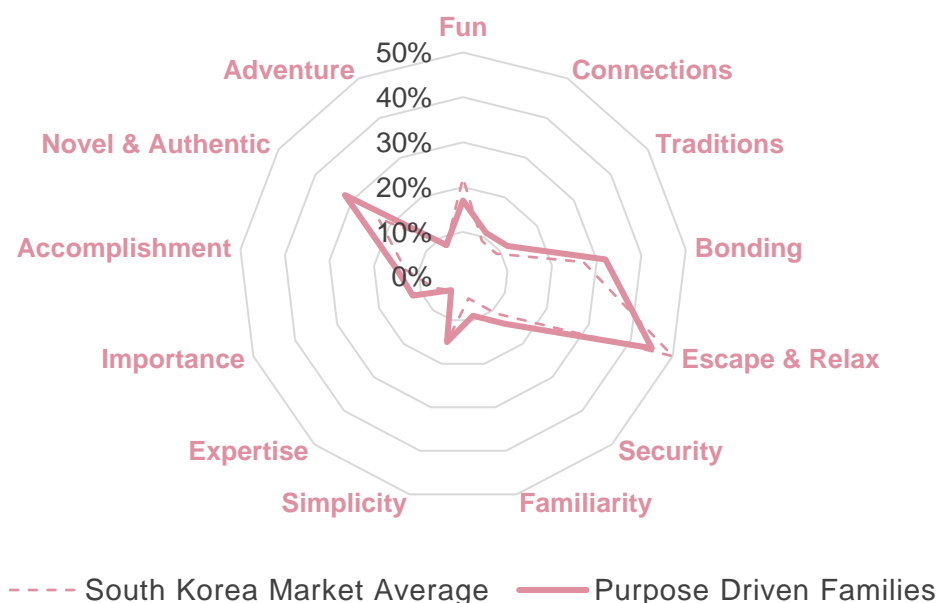
We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish hidden gems that support local cultures, and anywhere that lets us spend time in nature.

Travel is both a shared accomplishment and a personal journey of learning for the entire family. Though we seek socially responsible, impressive, new experiences, we also appreciate tourism infrastructure.

### WHAT YOU NEED TO KNOW ABOUT ME

- 1 We prioritize authentic exploration that allows us to discover and learn about the world.
- 2 We value being able to provide these experiences to our children, but we also appreciate how it demonstrates our success to others.
- 3 We rely heavily on recommendations from friends and family when selecting our destinations, and love to share our experience online.
- 4 While we challenge ourselves with new experiences and novel sports, we prefer even our remote destinations to still be built for tourism and offer packages.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

**129**

#### How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison



### TRAVELLER ECONOMIC INDEX

**112**

#### How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison



# PURPOSE DRIVEN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

- We value learning, engaging with local cultures, and exploring the history of our destinations.
- We use travel to experience something new, and view this as an accomplishment.
- We are passionate about travel, and seek authentic destinations that will make our friends say 'wow'.



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I like to come back from travels having learnt something new	78%	118
I am more likely to select destinations / activities that invest in socially responsible tourism	77%	138
When there's a lot of positive buzz about a destination it makes me want to visit it more	76%	122
I prioritize discovering new restaurants, stores, and hotels over revisiting familiar ones	74%	126
When I travel to natural environments it makes me reflect on how fortunate I am	72%	141
I love posting my trips on social media to share with friends	64%	125
I learn the basics of a language before visiting a country / region	62%	118
I seek out destinations where I can explore my ancestral heritage	61%	131
I'm a planner, while travelling I like to know what comes next	56%	132
I'd be open to using AI-powered chatbots for travel planning and assistance	48%	131
Even while travelling, I like to maintain regular contact with my duties or obligations back home	44%	128
Luxury experiences are an important part of travel	43%	119
I go where I want to go, no matter the hurdles	34%	120



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To explore and discover new things / places	36%	123
To have authentic experiences	32%	137
To bond through shared experiences	28%	114
To feel like I'm important	12%	145
To be familiar with my surroundings	10%	139
To push my limits and challenge myself	9%	130



## DESIRED DESTINATION

	SCORE	INDEX
Friendly	29%	109
Passionate	20%	128
Accepting	19%	131
Authentic	18%	128
Sociable	9%	116
Unexplored	8%	125



# PURPOSE DRIVEN FAMILIES

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We are parents aged 35-54, with kids of all ages.
- We attended post-secondary education, are working full-time, and earn medium incomes.



### AGE

	SCORE	INDEX
18-34	20%	94
35-54	65%	138
55+	15%	64
MEAN YEARS	42.8	73



### HH INCOME (CAD)\*

	SCORE	INDEX
Less than \$2.5K	17%	85
\$2.5K to <\$8K	69%	122
\$8K or more	11%	115
Refused	3%	74

\* HH Income reported by month



### EMPLOYMENT

	SCORE	INDEX
Employed FT	64%	149
Employed PT	6%	90
Self-employed	8%	65
Retired	1%	57



### EDUCATION

	SCORE	INDEX
Primary education or less	1%	92
Secondary education	10%	68
Post-secondary education	90%	131



**73%**

103 Have a valid passport



### GENDER

**56%**

105 Male

**44%**

95 Female

**0%**

Non-binary / Other



### HOUSEHOLD

**81%**

144 Children <18 Living At Home\*

**8%**

60 Children 18+ Living At Home\*

**2%**

55 Children NOT Living At Home\*

**16%**

59 No Children

\* Option is not exclusive



## SOUTH KOREA CITY BREAKOUT

	SCORE	INDEX
Gyeonggi-do	28%	69
Seoul	22%	111
Chungcheongbuk-do	6%	125
Gyeongsangbuk-do	6%	102
Gyeongsangnam-do	6%	65
Incheon	5%	145

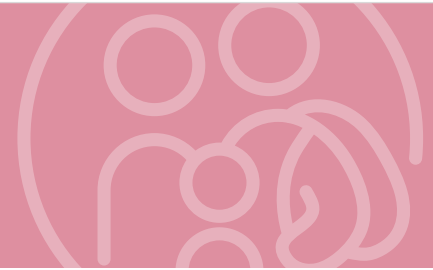
	SCORE	INDEX
Jeollanam-do	5%	150
Jeju-do	4%	157
Gwangju	4%	144
Chungcheongnam-do	4%	97
Daegu	3%	94





# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS



## TRAVEL TRADE INDEX: NON-GROUP

101

## TRAVEL TRADE INDEX: GROUP

58

**! KEY** terminology on this page

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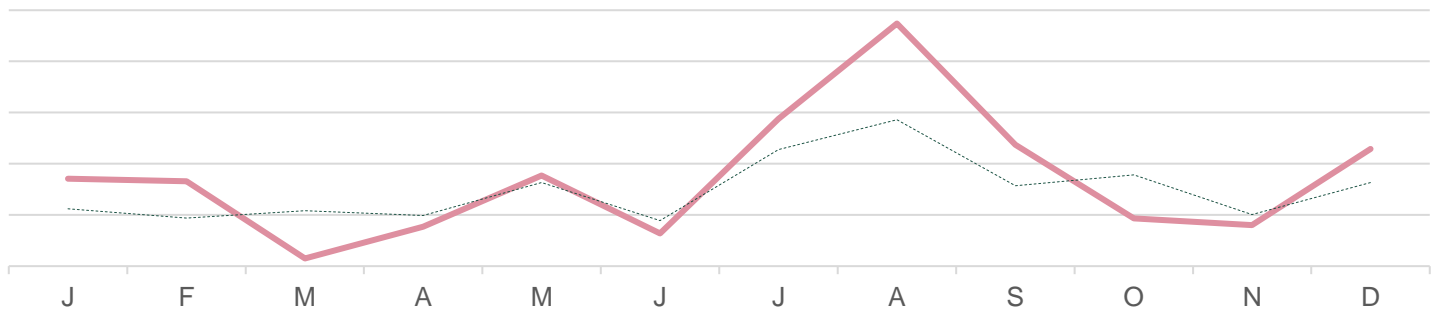
For additional definitions see [Glossary](#)



## TYPICAL TRAVEL MONTHS

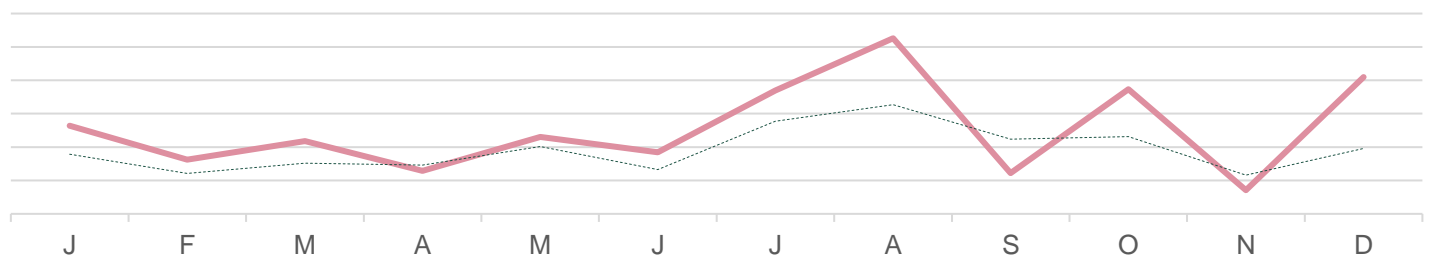
### For Flights of 3–7 Hours

— Purpose Driven Families  
 - - - Market Average



### For Flights of 7+ Hours

— Purpose Driven Families  
 - - - Market Average



## TRIP DURATION

INDEX

Duration	Percentage	Index
1-2 Days	59%	117
3-5 Days	34%	121
1 Week Holiday	11%	112
2 Weeks Holiday	5%	109
3 Weeks Or More	5%	121

*Incidence is frequency of 2+ times per year*



## TRIP TYPE

INDEX

Trip Type	Percentage	Index
Domestic Leisure	62%	104
International Leisure	20%	107
Business Trip	23%	129
Added Personal To Business	11%	120
Worked During Vacation	9%	128

*Incidence is frequency of 2+ times per year*



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	61%	117
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	38%	133
All-inclusive resort	23%	150
Premium Hotel	21%	110
Vacation Rental (e.g., Airbnb, Vrbo)	9%	87
Friend's or family's place	6%	84



## THOUGHTS ON INDIGENOUS TRAVEL

# 60%

125 INDEX SCORE

**I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit**

# 16%

125 INDEX SCORE

**Strong Interest In Indigenous Activities**



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	78%	124
You only ever get to know a country by experiencing its culture	63%	100
I'm willing to put in the effort while travelling in order to see lesser-known places	45%	107
I like to explore places that are off the beaten path and less explored	32%	97
I'm open to visiting destinations with challenging climates or weather conditions	22%	101
I'm open to travelling to destinations with limited tourist infrastructure	21%	99



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

- We travel primarily as a nuclear family.
- Our budgets are usually mid-ranged, but spend on experiences we really value.



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	71%	126
Kids	59%	137
Adult relatives	21%	71
Friends	8%	63
Solo	6%	85



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

# \$2,850

117  
INDEX SCORE

### SPEND STYLE

Premium / Upscale



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	75%	132
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	64%	134
I consider the impact that I personally have on the destinations I visit	62%	125
Hearing from underrepresented communities is an important part of travelling	49%	116
It's important for me to know that the money I spend will support the local economy I'm visiting	46%	130

# 73%

**PRIORITIZE  
SUSTAINABLE  
TRAVEL**

126 INDEX SCORE

**!** **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIORITIZE SUSTAINABLE TRAVEL** – The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES



## OVERALL INSIGHT

- Family attractions, cultural experiences, and local cuisine are highlights.
- We like to explore nature and take the opportunity to try seasonal sports of the destinations.



## TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
<b>Family-focused attractions</b> <ul style="list-style-type: none"> <li>○ Amusement parks or theme parks</li> <li>○ Zoos or aquariums</li> <li>○ Space or science centres</li> </ul>	<b>70%</b>	<b>139</b>
	<b>54%</b>	<b>140</b>
	<b>47%</b>	<b>134</b>
	<b>24%</b>	<b>147</b>
<b>Cultural experiences or attractions</b> <ul style="list-style-type: none"> <li>○ Museums</li> <li>○ Historical or archeological sites</li> </ul>	<b>70%</b>	<b>132</b>
	<b>46%</b>	<b>139</b>
	<b>41%</b>	<b>124</b>
<b>Winter-based sports</b> <ul style="list-style-type: none"> <li>○ Snowboarding or downhill skiing</li> <li>○ Ice skating or hockey</li> </ul>	<b>10%</b>	<b>119</b>
	<b>8%</b>	<b>135</b>
	<b>3%</b>	<b>131</b>
<b>Local cuisine</b> <ul style="list-style-type: none"> <li>○ Local restaurants</li> <li>○ Cafes or bakeries</li> </ul>	<b>58%</b>	91
	<b>53%</b>	97
	<b>29%</b>	103
<b>Nature experiences</b> <ul style="list-style-type: none"> <li>○ Oceanside beaches</li> <li>○ Visit city parks or gardens</li> </ul>	<b>47%</b>	109
	<b>31%</b>	109
	<b>20%</b>	<b>123</b>
<b>Festivals and events</b>	<b>39%</b>	113
<b>Shopping</b>	<b>34%</b>	95
<b>Health and wellness</b>	<b>31%</b>	<b>66</b>
<b>Guided tours</b>	<b>24%</b>	99
<b>Casual sports</b>	<b>12%</b>	104
<b>Overnight experiences</b>	<b>13%</b>	95
<b>Water-based sports</b>	<b>10%</b>	100



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	71%	122	94%	143
To escape from routine	56%	84	59%	112
To relax and unwind	49%	94	53%	105
To be pampered	40%	125	11%	51
To learn through other cultures	27%	131	19%	88
To have fun with friends	9%	83	6%	66
To have memories from top travel spots	18%	116	5%	62
To check off dream travel places	8%	69	16%	91
For personal reflection and growth	11%	116	0%	57



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	58%	130	75%	144
Family / friends wanted to go	81%	144	70%	147
Partner / spouse wanted to go	46%	96	65%	122
Festival or event	30%	108	32%	100
Special event (e.g., wedding, reunion)	26%	130	44%	151
Visiting friends / family	17%	84	19%	86

**50%** 142  
INDEX SCORE

Travel aligns with  
children's school schedule

**50%** 145  
INDEX SCORE

Take time off for vacation  
during major holidays

**27%** 96  
INDEX SCORE

Difficult to take more than a  
few days of vacation at once



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- We are busy parents, so do not always plan in advance. Most items are not booked more than 1-2 months before the trip.

# 62%

**Primary Trip Planner**

104  
INDEX SCORE

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
3–7 HOURS

FLIGHT OF  
7+ HOURS

- Started Researching and Planning – 2.6 months**
  - Recommendations from friends or family
- Booked Transportation – 2 months**
  - Travel booking sites / apps
- Booked Accommodation – 1.7 months**
  - Travel booking sites / apps
- Booked Activities – 1.4 months**
  - Travel booking sites / apps



\*The incidence of this traveller segment taking recent trips of the flight duration indicated above resulted in a base size too small for statistically reliable analysis.





# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips focus on friendly and safe family travel to well-known and luxury resorts.
- We also take trips like Simplicity Lovers or Refined Globetrotters.

**!** **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **SEGMENT ALIGNMENT** – The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

**18%** 154 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids	<b>63%</b>	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants	<b>48%</b>	
	Zoos or aquariums	<b>30%</b>	
	Museums	<b>25%</b>	
KEY BEHAVIOURS	Kid-friendly resort with activities for the kids and sought after landscapes and scenery		

% OF TOTAL TRIPS

**8%** 106 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Luxury Resort		
COMPANIONS	Nuclear family with kids	<b>44%</b>	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Security
ACTIVITIES	Amusement parks or theme parks	<b>28%</b>	
	Street cuisine	<b>21%</b>	
	Oceanside beaches	<b>17%</b>	
KEY BEHAVIOURS	High-end and trendy all inclusive, where we do not have to worry about anything		

% OF TOTAL TRIPS

**20%** 106 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Extended Family		
DESTINATION TYPE	Beach resort	<b>19%</b>	
	Urban centre	<b>18%</b>	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants	<b>59%</b>	
	Cafes or bakeries	<b>20%</b>	
KEY BEHAVIOURS	Budget-friendly peaceful and safe destination to gather with extended family		

% OF TOTAL TRIPS

**20%** 105 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Couples Trip		
DESTINATION TYPE	Urban centre	<b>15%</b>	
	Cultural experience	<b>14%</b>	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants	<b>58%</b>	
	Historical or archeological sites	<b>24%</b>	
	Visiting local monuments	<b>23%</b>	
KEY BEHAVIOURS	A trip to escape and unwind as a couple. Easy, straight-forward, low-impact sightseeing		



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – WHERE WE GO



## OVERALL INSIGHT

- We are looking for cultural and remote destinations that still offer established tourism offerings and packaged vacations.
- We take frequent trips, both to domestic and international destinations.



## WHERE WE ARE GOING LATELY

	SCORE	INDEX		SCORE	INDEX
South Korea	48%	107	China	3%	91
Japan	19%	100	France	2%	121
Vietnam	9%	120	Philippines	2%	88
Singapore	4%	149	New Zealand	2%	140
US	4%	95	Spain	2%	114



## WHERE DO WE WANT TO GO



## DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is kid-friendly	69%	149
Has well-developed tourism infrastructure	43%	116
Is inclusive and tolerant	26%	116
Provides opportunities to view wildlife in its natural habitat	13%	110
Has a thriving arts and music scene	13%	125
Offers all-inclusive resort packages	11%	113
Has a small town feel	9%	132
Provides a remote, no-frills experience	6%	123



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- We likely have not been to Canada before.
- A future trip would likely explore Ontario cities and attractions.



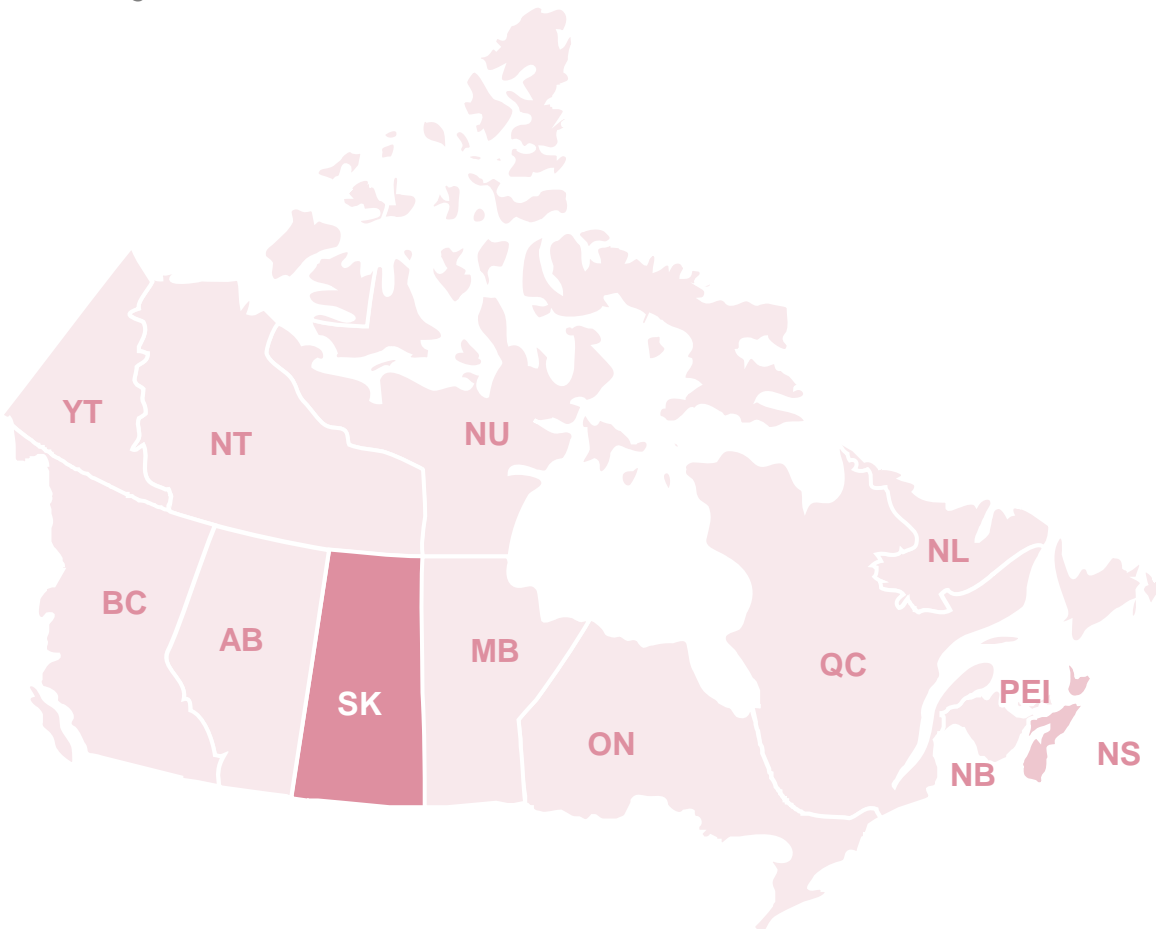
## WHERE DO WE WANT TO GO IN CANADA

MONTREAL NIAGARA FALLS  
 QUEBEC TORONTO  
 VANCOUVER OTTAWA



## PROVINCES WE HAVE VISITED BEFORE

*Amongst Prior Canada Travellers*



PROVINCES	%	INDEX
AB	0%	57
BC	24%	94
MB	0%	68
NB	6%	86
NL	6%	97
NS	5%	121
NT	0%	68
NU	0%	62
ON	27%	97
PEI	0%	66
QC	27%	85
SK	7%	125
YT	0%	63



# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- For those of us who have visited Canada, it was most likely during spring.
- We know some about Canadian travel destinations and may consider it for a future trip.



### CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
PURPOSE DRIVEN FAMILIES	24%	49%	18%	17%
VS. TOTAL MARKET	23%	30%	28%	30%

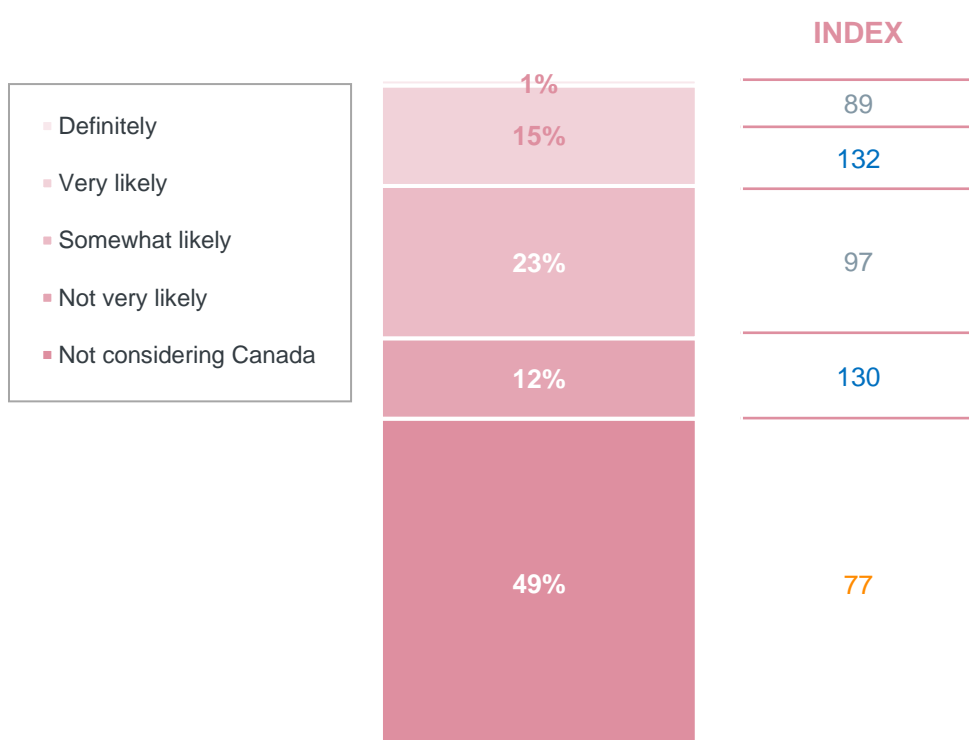
# 8%

Been to Canada in last 5 years

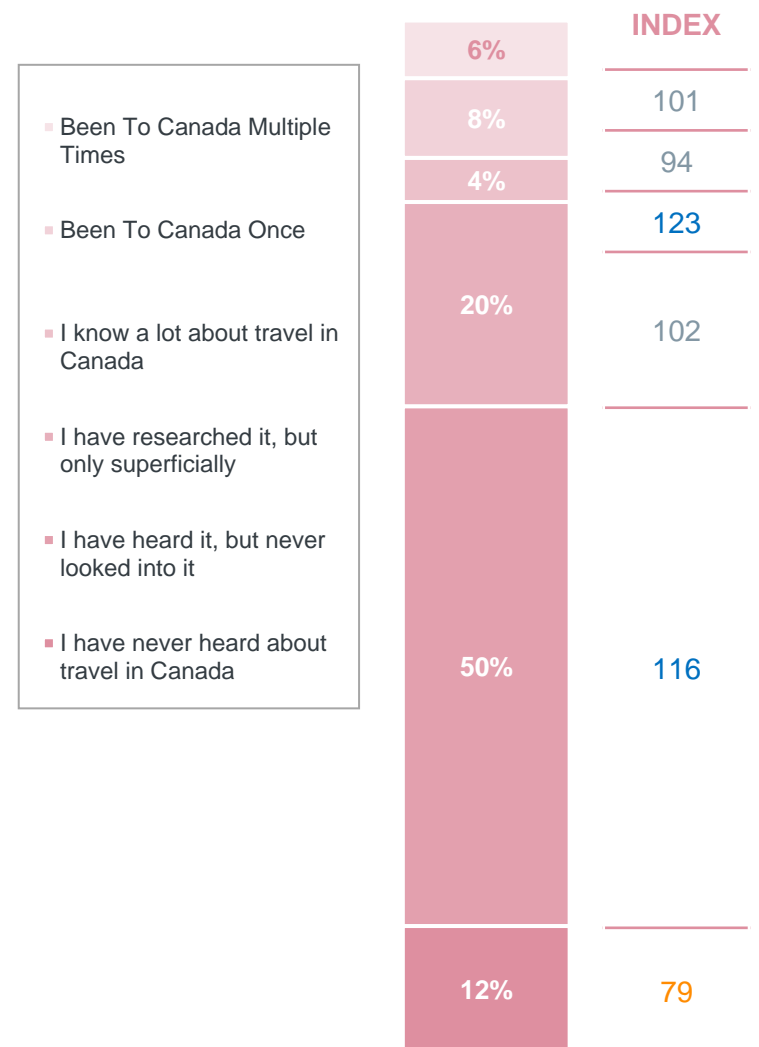
101 INDEX SCORE



### LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



### FAMILIARITY WITH CANADA





# PURPOSE DRIVEN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

- We are in a busy time of life, with many things experiencing change. New homes and vehicles all take money away from our goal of growing our savings.
- We are also focused on our growing and changing family, whether that means welcoming a new family member, or seeing our kids start school for the first time.



## MAJOR LIFE EVENTS IN LAST 5 YEARS

# 11%

Had a child

129 INDEX SCORE

# 21%

Started a new job / career

66 INDEX SCORE

# 26%

Bought a new home

123 INDEX SCORE

# 25%

Moved to a new city

160 INDEX SCORE

# 39%

Child started school

139 INDEX SCORE

# 45%

Purchased a car

133 INDEX SCORE

# 2%

Retired

60 INDEX SCORE

# 48%

Renovated house

142 INDEX SCORE



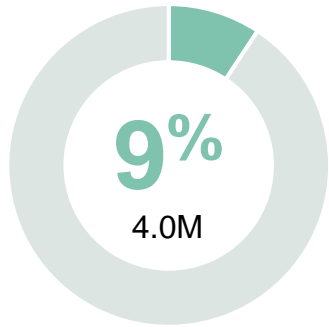
## NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	67%	98
Travel	66%	91
Personal care and wellness	50%	115
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	42%	97
Fashion and accessories	35%	122
Technology and gadgets	13%	65



# CITY TRIPPERS

PSYCHOGRAPHICS – SUMMARY



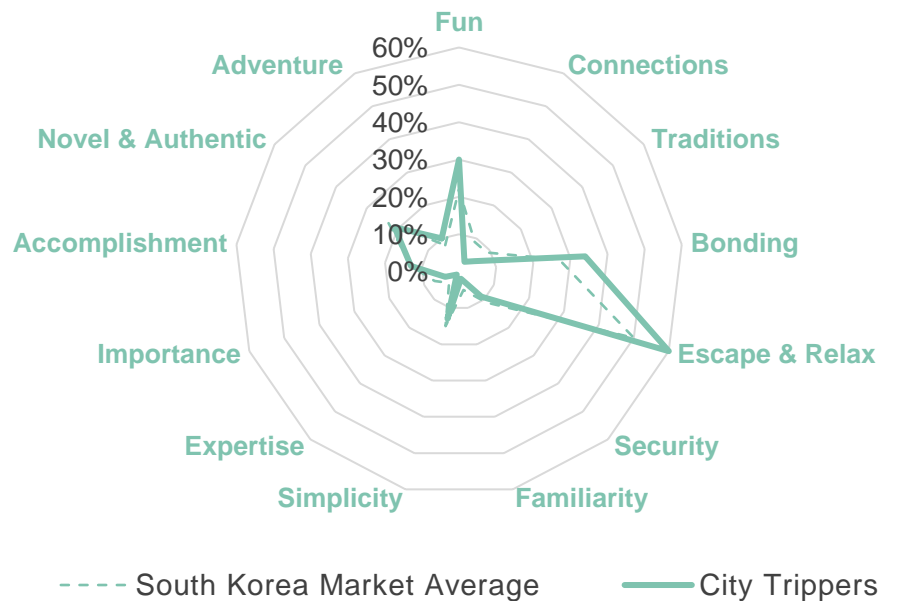
## % OF SOUTH KOREA POPULATION

We are independent, sociable, and trendy travelers who prioritize having fun, indulging, and living in the moment. We prefer trendy, friendly locations with a variety of activities and distractions, valuing safety and ease of travel. We relish culinary and cultural experiences. Our travel decisions focus on enjoying ourselves and creating memorable experiences with friends and loved ones.

### WHAT YOU NEED TO KNOW ABOUT ME

- 1 We prioritize fun and social settings and seek experiences that feel indulgent, even if we are not spending too much.
- 2 Most of our trips are short and to domestic locations. We travel internationally every few years, and we are most inspired by online videos and social media.
- 3 We value simplicity in our travels, preferring destinations that are convenient to get to and are built for tourism. If we can save some money even better.
- 4 While we primarily travel as a couple or with friends, we sometimes slow down and travel with parents or extended family.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

79

#### How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison



### TRAVELLER ECONOMIC INDEX

76

#### How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison





# CITY TRIPPERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

- We select destinations that offer a fun, social setting, allowing us to fully indulge and live in the moment.
- While we seek free-spirited escapes, we prefer to stick to popular areas and see all the famous attractions.
- Our primary way to engage with the local culture is to immerse ourselves in the local cuisine.



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I prefer destinations with lots of distractions and things to do	90%	145
Videos and pictures on social media inspire me to travel	85%	148
Trying out local cuisine is a really important part of travel	85%	137
I will generally not go out of my way to buy local when travelling	84%	128
I generally stick to the most popular areas when I visit somewhere	81%	126
When there's a lot of positive buzz about a destination it makes me want to visit it more	81%	135
I prefer planning my trips independently and don't consult travel agencies	79%	131
I'm always on the look out for new destinations to visit next	77%	123
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	74%	128
I generally don't go out of my way to seek out perspectives from underrepresented communities	74%	125
I like natural attractions but I don't usually think they are the highlights of my trip	67%	132
I make sure to visit the "famous" sites wherever I go	66%	122
I love posting my trips on social media to share with friends	63%	122



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To let loose and forget about day-to-day life	79%	125
To just enjoy myself and have fun	74%	135
To escape the demands of everyday life	54%	123
To share quality time with others	39%	121
To have a fun, social setting	18%	149
To indulge myself and live in the moment	17%	123



## DESIRED DESTINATION

	SCORE	INDEX
Fun	82%	147
Safe	70%	117
Charming	56%	120
Carefree	33%	111
Trendy	30%	147
Free-Spirited	30%	125



# CITY TRIPPERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We represent a diverse age range. We are employed, or may still be finishing our education, generally earning a low-medium income.
- Many of us are not parents, or our children are older and not living at home anymore.



### AGE

	SCORE	INDEX
18-34	44%	144
35-54	30%	84
55+	27%	83
MEAN YEARS	41.6	67



### HH INCOME (CAD)\*

	SCORE	INDEX
Less than \$2.5K	27%	128
\$2.5K to <\$8K	63%	68
\$8K or more	6%	75
Refused	5%	124

\* HH Income reported by month



### EMPLOYMENT

	SCORE	INDEX
Employed FT	57%	96
Employed PT	7%	104
Self-employed	9%	71
Retired	5%	80



### EDUCATION

	SCORE	INDEX
Primary education or less	1%	87
Secondary education	25%	139
Post-secondary education	74%	66



**68%**

92 Have a valid passport



### GENDER

**44%**

61 Male

**56%**

139 Female

**0%**

Non-binary / Other



### HOUSEHOLD

**17%**

87 Children <18 Living At Home\*

**22%**

92 Children 18+ Living At Home\*

**10%**

86 Children NOT Living At Home\*

**73%**

119 No Children

\* Option is not exclusive



## SOUTH KOREA CITY BREAKOUT

	SCORE	INDEX
Gyeonggi-do	30%	88
Seoul	17%	67
Gyeongsangbuk-do	10%	146
Gyeongsangnam-do	9%	124
Jeollabuk-do	5%	116
Chungcheongbuk-do	5%	102

	SCORE	INDEX
Busan	4%	94
Chungcheongnam-do	4%	93
Daegu	3%	102
Jeollanam-do	3%	103
Incheon	3%	109



# CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL HABITS

## TRAVEL TRADE INDEX: NON-GROUP

69

## TRAVEL TRADE INDEX: GROUP

76

### ! KEY terminology on this page

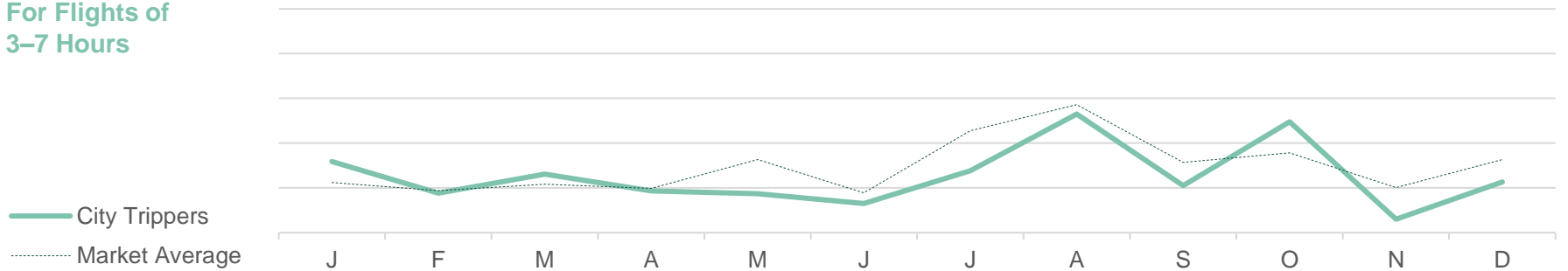
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP** – The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

For additional definitions see [Glossary](#)

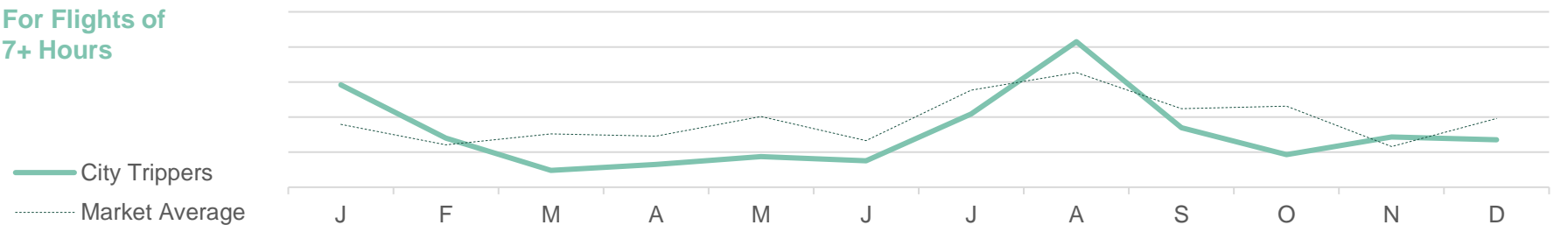


## TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



## TRIP DURATION

INDEX

1-2 Days	56%	105
3-5 Days	25%	90
1 Week Holiday	4%	78
2 Weeks Holiday	2%	79
3 Weeks Or More	1%	76

*Incidence is frequency of 2+ times per year*



## TRIP TYPE

INDEX

Domestic Leisure	66%	117
International Leisure	12%	77
Business Trip	14%	78
Added Personal To Business	3%	74
Worked During Vacation	3%	85

*Incidence is frequency of 2+ times per year*



# CITY TRIPPERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	62%	121
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	25%	93
Bed & Breakfast	19%	120
Vacation Rental (e.g., Airbnb, Vrbo)	16%	133
Budget Hotel	16%	143
All-inclusive resort	12%	78



## THOUGHTS ON INDIGENOUS TRAVEL

# 33%

86 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

# 10%

97 INDEX SCORE

Strong Interest In Indigenous Activities



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	61%	95
I really want to learn about the history of the destinations I visit	55%	84
I'm willing to put in the effort while travelling in order to see lesser-known places	34%	82
I like to explore places that are off the beaten path and less explored	19%	74
I'm open to visiting destinations with challenging climates or weather conditions	17%	86
I'm open to travelling to destinations with limited tourist infrastructure	15%	82



# CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

- Our travel groups are generally adults only including our partner, extended family and/or friends.
- Our budget is mid-range. We do not often splurge.



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	47%	78
Adult relatives	31%	108
Friends	23%	140
Kids	10%	91
Solo	7%	89



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

# \$1,800

70  
INDEX SCORE

### SPEND STYLE

Mid-range



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	54%	82
I consider the impact that I personally have on the destinations I visit	45%	85
Hearing from underrepresented communities is an important part of travelling	26%	75
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	26%	72
It's important for me to know that the money I spend will support the local economy I'm visiting	16%	72

# 45%

## PRIORITIZE SUSTAINABLE TRAVEL

75 INDEX SCORE

! **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIORITIZE SUSTAINABLE TRAVEL** – The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."



# CITY TRIPPERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES



## OVERALL INSIGHT

- We enjoy shopping, dining, festivals, and nightlife.
- Our larger travel groups with extended family are well suited to well-known attractions.



## TOP DESIRED TRAVEL ACTIVITIES

	SCORE	INDEX
Local cuisine	<b>78%</b>	121
○ Local restaurants	<b>70%</b>	125
○ Street cuisine	<b>49%</b>	129
○ Cafes or bakeries	<b>46%</b>	143
Shopping	<b>59%</b>	143
○ Souvenir shopping	<b>41%</b>	149
○ Visiting famous shopping centres or areas	<b>39%</b>	144
Festivals and events	<b>49%</b>	137
○ Cultural or traditional festivals	<b>33%</b>	138
○ Music concerts or festivals	<b>26%</b>	141
Nightlife	<b>23%</b>	140
○ Bars and pubs	<b>18%</b>	144
○ Clubs and dancing	<b>6%</b>	118
Water-based sports	<b>14%</b>	112
○ Scuba diving or snorkeling	<b>9%</b>	131
○ Swimming	<b>7%</b>	120
Cultural experiences or attractions	<b>61%</b>	111
Health and wellness	<b>43%</b>	111
Nature experiences	<b>37%</b>	81
Family-focused attractions	<b>34%</b>	101
Guided tours	<b>22%</b>	91
Overnight experiences	<b>14%</b>	99
Casual sports	<b>5%</b>	72





# CITY TRIPPERS

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To escape from routine	78%	138	65%	130
To relax and unwind	45%	87	40%	73
To spend time with family	40%	83	57%	93
To be pampered	28%	93	46%	133
To have fun with friends	27%	151	17%	103
To check off dream travel places	26%	104	21%	105
To have memories from top travel spots	17%	111	19%	124
To learn through other cultures	20%	95	15%	71
For a romantic getaway	7%	102	2%	86



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	64%	114	59%	105
Partner / spouse wanted to go	53%	116	46%	88
Festival or event	39%	132	32%	100
Visiting friends / family	18%	92	21%	94
Special event (e.g., wedding, reunion)	25%	125	27%	114
Kids wanted to go	28%	93	22%	86

**18%** 89  
INDEX SCORE

Travel aligns with  
children's school schedule

**43%** 117  
INDEX SCORE

Take time off for vacation  
during major holidays

**31%** 116  
INDEX SCORE

Difficult to take more than a  
few days of vacation at once



# CITY TRIPPERS

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- We book transportation and accommodation a few months in advance, and leave activities until later.

# 55%

**Primary Trip Planner**

79

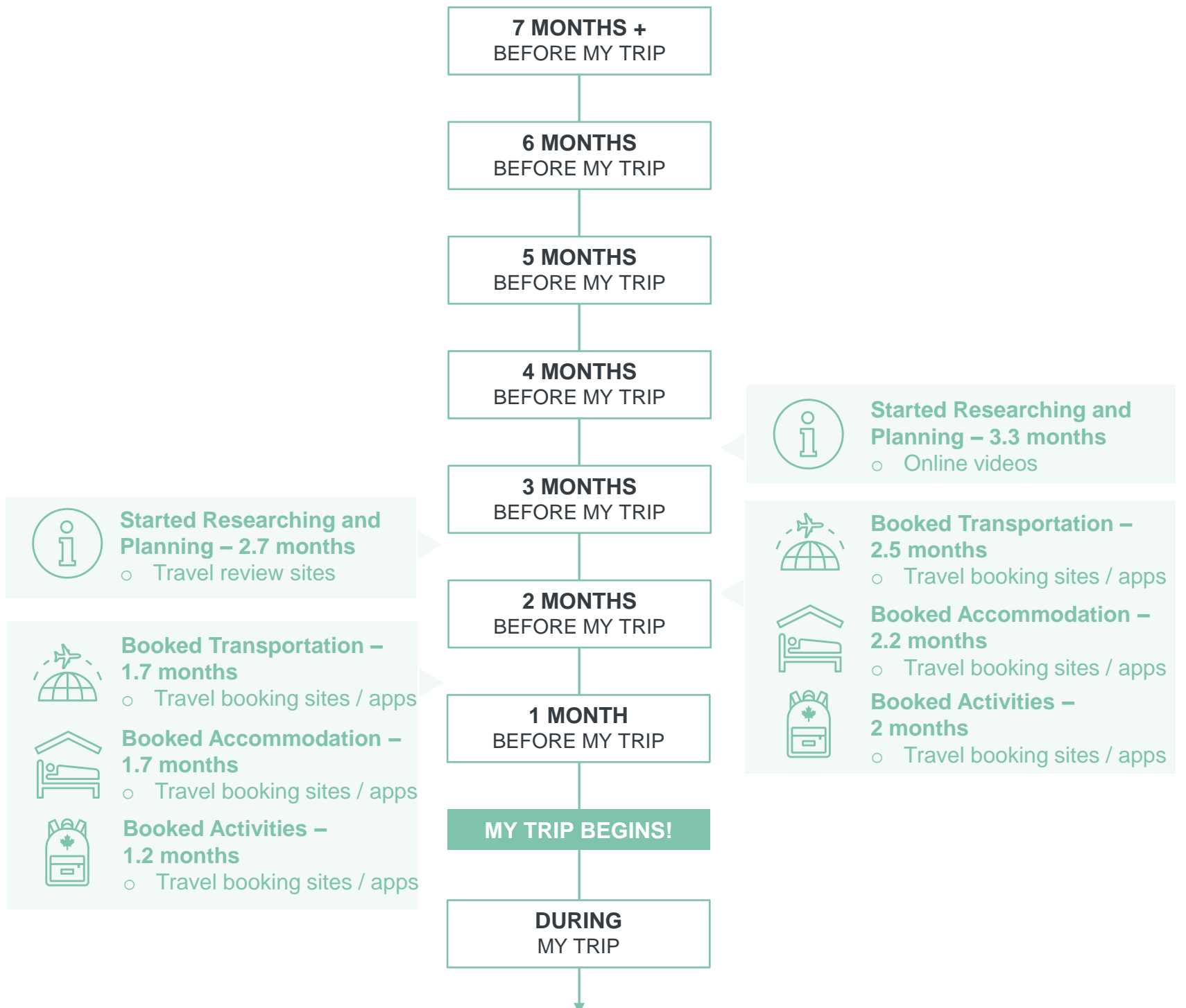
INDEX SCORE

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
3–7 HOURS

FLIGHT OF  
7+ HOURS





# CITY TRIPPERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips focus on fun, escape, and connection with our friends and family.
- We also take trips like Simplicity Lovers.

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **SEGMENT ALIGNMENT** – The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

**23%** 113 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Friends Trip		
DESTINATION TYPE	Urban centre	28%	
	Cultural experience	15%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
	Local restaurants		59%
	Souvenir shopping		25%
ACTIVITIES	Oceanside beaches		17%
	KEY BEHAVIOURS		
All about fun and feeling free with friends. Staying in a vacation rental or beachside cottage			

% OF TOTAL TRIPS

**29%** 178 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Urban Centre		
COMPANIONS	Extended family	32%	
	Couple only	31%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
	Local restaurants		69%
	Cafes or bakeries		42%
ACTIVITIES	Street cuisine		38%
	KEY BEHAVIOURS		
An escape to a well-developed destination with famous attractions. Immersing in cuisine			

% OF TOTAL TRIPS

**10%** 113 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only	36%	
	Extended family	30%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
	Local restaurants		66%
	Oceanside beaches		32%
ACTIVITIES	Nature walks		15%
	KEY BEHAVIOURS		
Peaceful destination away from crowds. Low impact activities. Maybe staying in a lodge			

% OF TOTAL TRIPS

**6%** 97 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Island Getaway		
COMPANIONS	Extended family	43%	
	Escape & Relax	Fun	Simplicity
TRIP EMOTIONAL MOTIVATIONS	Oceanside beaches		57%
	Local restaurants		46%
	Nature walks		19%
ACTIVITIES	KEY BEHAVIOURS		
	Larger family group to a charming and safe destination. Perhaps staying in a cabin or lodge		





# CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- We are unlikely to have visited Canada before.
- If we have been, it may have been to British Columbia or Ontario.
- We are not likely to consider Canada in the next two years.

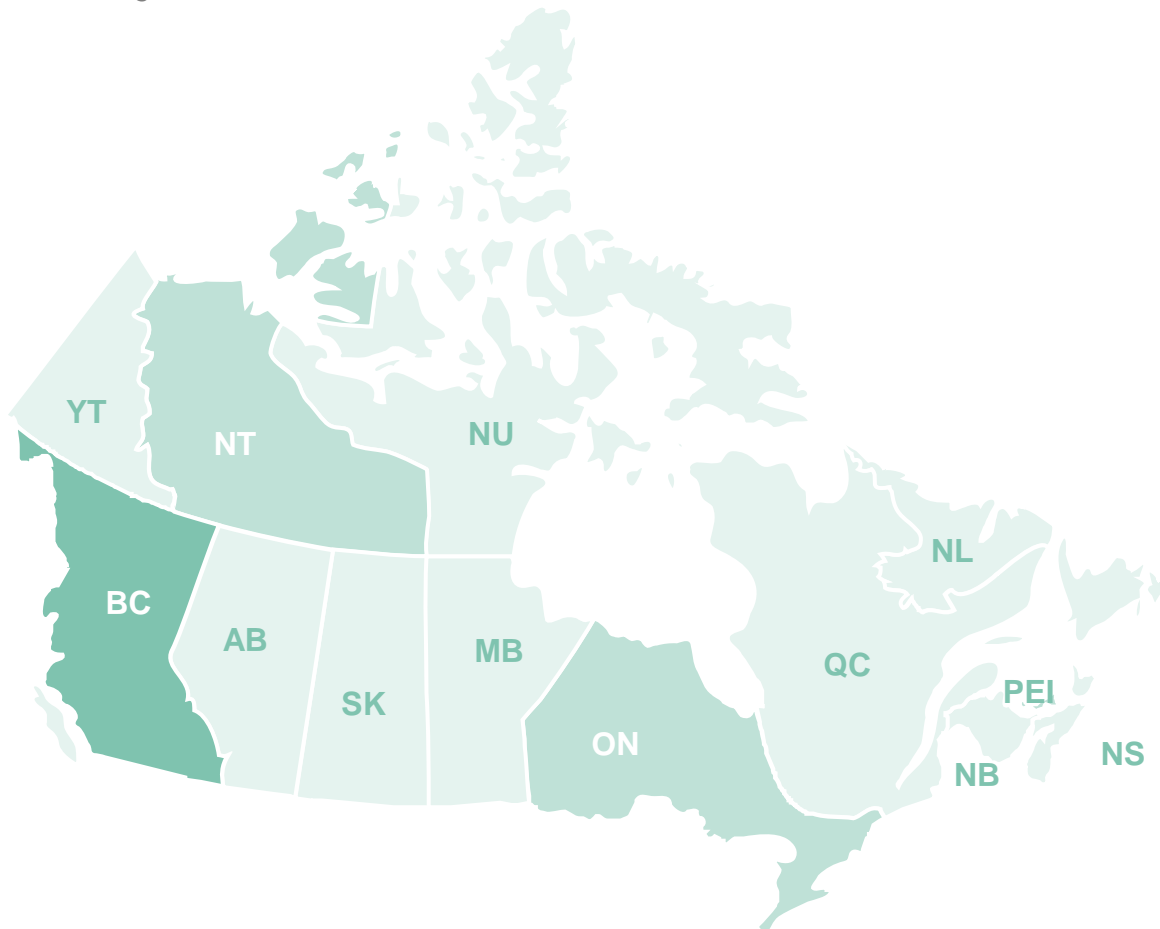


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	5%	79
BC	48%	156
MB	0%	68
NB	14%	112
NL	4%	86
NS	0%	70
NT	9%	118
NU	0%	62
ON	36%	118
PEI	0%	66
QC	32%	92
SK	0%	69
YT	0%	63



# CITY TRIPPERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- If we have visited, it has been primarily in the summer and fall seasons.
- Overall we do not know much about Canada has a travel destination.



### CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
CITY TRIPPERS	19%	24%	39%	33%
VS. TOTAL MARKET	23%	30%	28%	30%

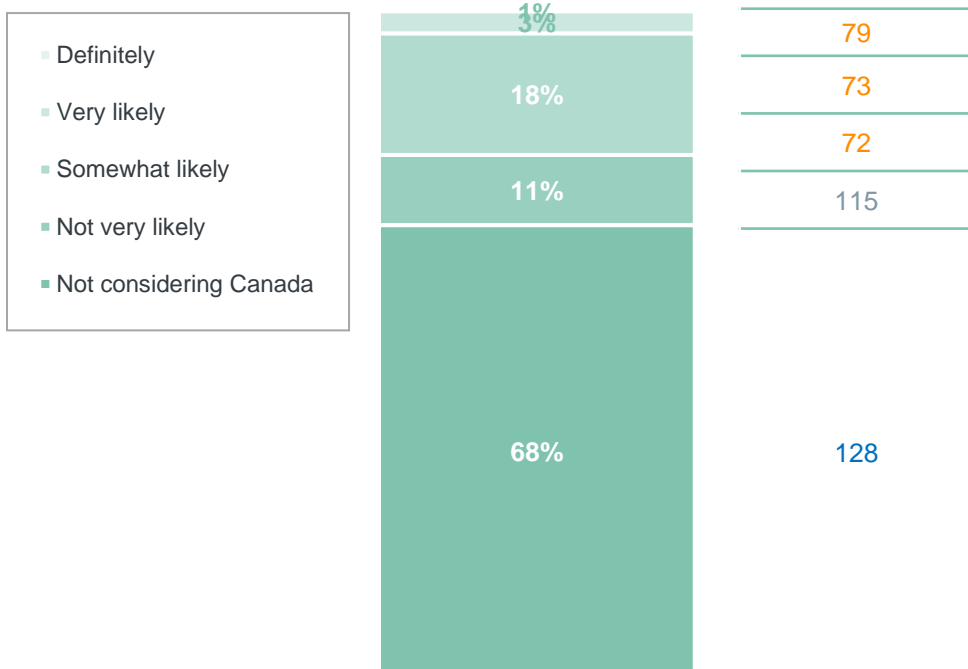
# 3%

Been to Canada in last 5 years

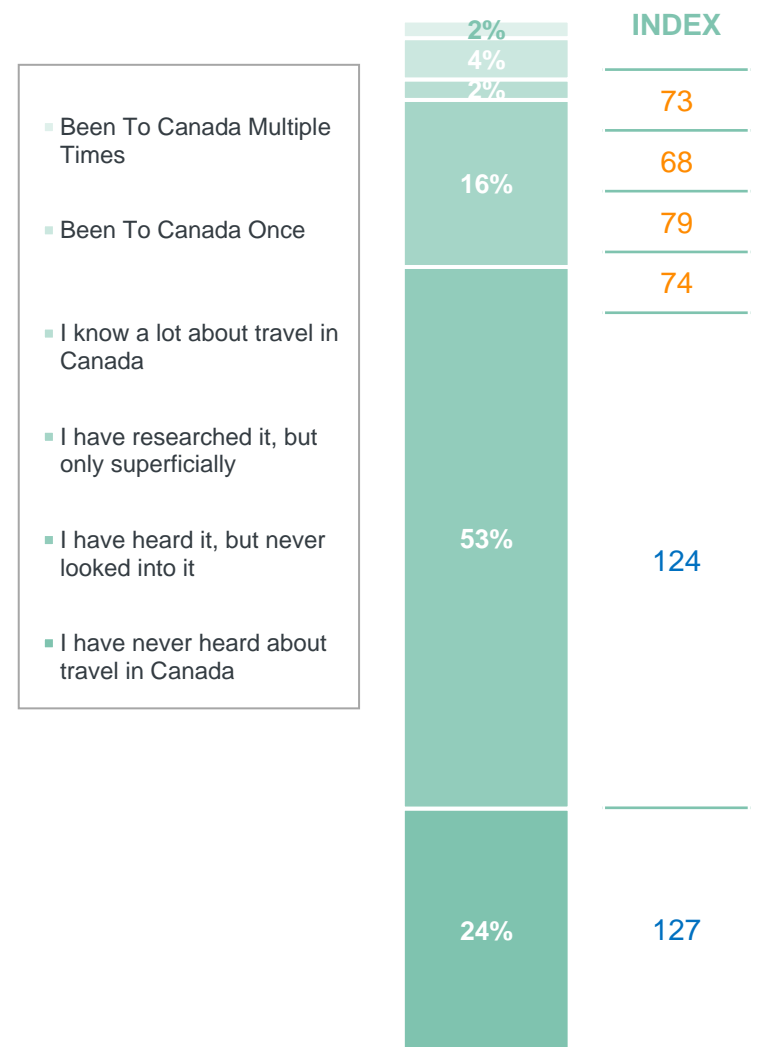
73 INDEX SCORE



### LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



### FAMILIARITY WITH CANADA







# CITY TRIPPERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

- Events in recent years have included travel and starting a new job.
- After spending on travel, our next biggest priority is fashion.



### MAJOR LIFE EVENTS IN LAST 5 YEARS

# 2%

Had a child

96 INDEX SCORE

# 32%

Started a new job / career

135 INDEX SCORE

# 14%

Bought a new home

91 INDEX SCORE

# 19%

Moved to a new city

111 INDEX SCORE

# 13%

Child started school

90 INDEX SCORE

# 33%

Purchased a car

80 INDEX SCORE

# 6%

Retired

92 INDEX SCORE

# 39%

Renovated house

99 INDEX SCORE



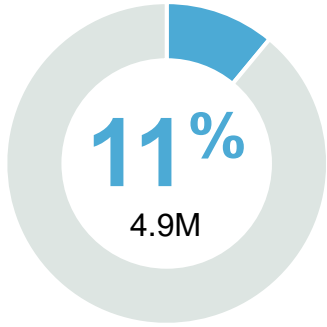
### NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	66%	97
Travel	64%	79
Personal hobbies and interests (e.g., sports equipment, books, art supplies).	46%	109
Personal care and wellness	45%	85
Fashion and accessories	40%	147
Experiences (e.g., concerts, events).	16%	127



# SIMPLICITY LOVERS

PSYCHOGRAPHICS – SUMMARY



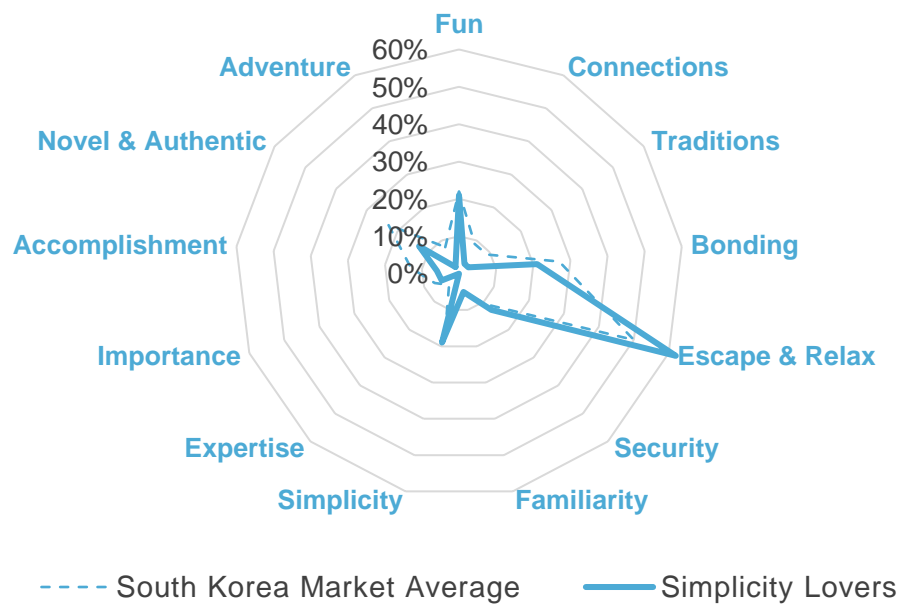
## % OF SOUTH KOREA POPULATION

We seek peace, relaxation, and familiarity in our journeys, preferring easy and affordable destinations with scenery we can explore at our own pace. Prioritizing dining and nature experiences, we value simplicity and serenity. Loyal to regular destinations, we appreciate safety and ease of travel, and while we enjoy new cultures, we often stay within our comfort zone.

### WHAT YOU NEED TO KNOW ABOUT ME

- 1** We seek peace, relaxation, and familiarity in our travels, preferring easy, affordable destinations offering a sense of safety.
- 2** Our trips are short, often just a few days. We plan with little notice, and use travel agents to help us feel secure and confident.
- 3** Loyal to regular destinations, we are creatures of habit who favor simplicity and serenity over glitz, glamour, and cultural immersion.
- 4** We like to explore destinations known for landscapes and scenery at our own pace, taking quiet moments to reflect.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

**73**

#### How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison



### TRAVELLER ECONOMIC INDEX

**66**

#### How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison



# SIMPLICITY LOVERS

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

- We are creatures of habit and seek familiar, safe and practical destinations.
- Prioritizing simplicity and serenity, we favor understated locales, and don't see the value of posting our travels online.
- We do not travel often, but when we do it needs to be easy, direct, and offer moments of quiet in nature.



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally avoid places that are challenging or difficult to reach	90%	124
I don't generally seek out luxury experiences while travelling	83%	135
I travel when I need to	82%	147
I generally don't participate in physical activities during my holidays	79%	143
I appreciate diversity but not likely engage deeply with Indigenous cultures	77%	128
I don't see the point of posting about my trips on social media	77%	150
I prefer wandering around without a set agenda, even if that means missing some "famous" sites	58%	137
You can get to know a country without experiencing its culture	51%	133
I generally prefer to go back to the same destinations on holiday	50%	147
I seek out destinations that offer quiet opportunities for deep self-reflection	49%	130
I don't consider travel to be an important milestone of growing up	46%	144
It's not important to me that I come back from travels having learnt something new	46%	138
I'm not influenced by social media content when it comes to travel	42%	132



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To let loose and forget about day-to-day life	79%	125
To just enjoy myself and have fun	64%	120
To find much-needed time to relax	57%	122
To escape the demands of everyday life	55%	125
To enjoy simple, straightforward travel	38%	144
To feel safe and secure	23%	139



## DESIRED DESTINATION

	SCORE	INDEX
Safe	78%	132
Peaceful	66%	144
Reliable	50%	129
Relaxed	49%	147
Practical	36%	146
Familiar	31%	146



# SIMPLICITY LOVERS

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We are generally aged 45+, likely retired.
- Our monthly incomes are moderate, or can be a little lower due to retirement.
- Our kids are older or have moved. Some of us may be working at home as full-time parents.



### AGE

	SCORE	INDEX
18-34	12%	77
35-54	41%	101
55+	48%	117
MEAN YEARS	51.7	123



### HH INCOME (CAD)\*

	SCORE	INDEX
Less than \$2.5K	26%	122
\$2.5K to <\$8K	64%	78
\$8K or more	6%	77
Refused	5%	119

\* HH Income reported by month



### EMPLOYMENT

	SCORE	INDEX
Employed FT	54%	73
Employed PT	6%	83
Self-employed	13%	122
Retired	12%	127



### EDUCATION

	SCORE	INDEX
Primary education or less	1%	90
Secondary education	17%	102
Post-secondary education	82%	100



**60%**

76 Have a valid passport



### GENDER

**54%**

99 Male

**46%**

101 Female

**0%**

Non-binary / Other



### HOUSEHOLD

**20%**

90 Children <18 Living At Home\*

**32%**

113 Children 18+ Living At Home\*

**18%**

122 Children NOT Living At Home\*

**62%**

107 No Children

\* Option is not exclusive



## SOUTH KOREA CITY BREAKOUT

	SCORE	INDEX
Gyeonggi-do	37%	142
Seoul	19%	80
Gyeongsangnam-do	7%	82
Chungcheongnam-do	6%	117
Busan	6%	108
Jeollabuk-do	5%	112

	SCORE	INDEX
Gyeongsangbuk-do	5%	87
Chungcheongbuk-do	4%	86
Jeollanam-do	3%	109
Daegu	2%	87
Gangwon-do	2%	100



# SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL HABITS



## TRAVEL TRADE INDEX: NON-GROUP

98

## TRAVEL TRADE INDEX: GROUP

84

### ! KEY terminology on this page

- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP** – The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

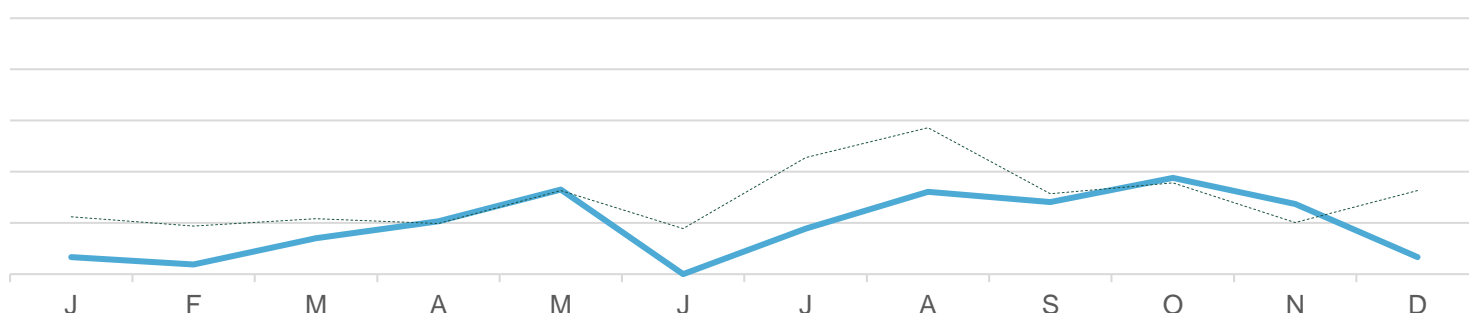
For additional definitions see [Glossary](#)



## TYPICAL TRAVEL MONTHS

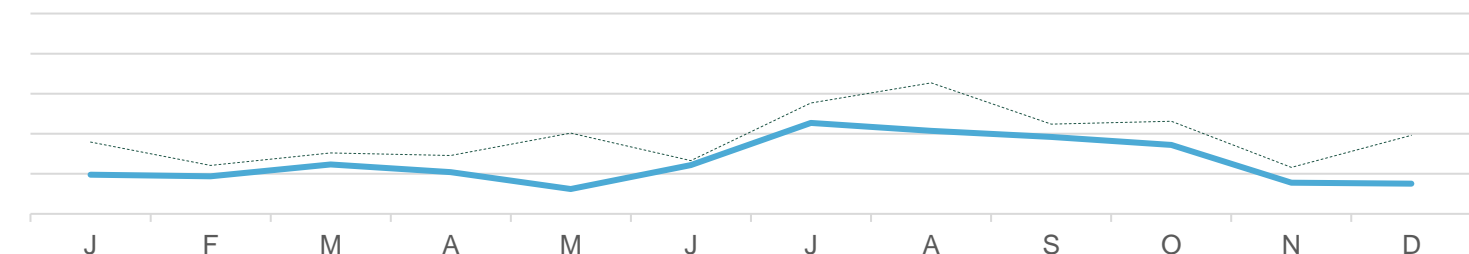
### For Flights of 3–7 Hours

— Simplicity Lovers  
 ..... Market Average



### For Flights of 7+ Hours

— Simplicity Lovers  
 ..... Market Average



## TRIP DURATION

INDEX

1-2 Days	52%	89
3-5 Days	16%	57
1 Week Holiday	2%	71
2 Weeks Holiday	1%	68
3 Weeks Or More	1%	81

*Incidence is frequency of 2+ times per year*



## TRIP TYPE

INDEX

Domestic Leisure	58%	88
International Leisure	11%	74
Business Trip	15%	81
Added Personal To Business	4%	78
Worked During Vacation	2%	78

*Incidence is frequency of 2+ times per year*



# SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	63%	122
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	28%	104
Bed & Breakfast	19%	124
All-inclusive resort	13%	83
Friend's or family's place	11%	139
Budget Hotel	9%	103



## THOUGHTS ON INDIGENOUS TRAVEL

# 23%

72 INDEX SCORE

I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit

# 4%

73 INDEX SCORE

Strong Interest In Indigenous Activities



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
I really want to learn about the history of the destinations I visit	53%	80
You only ever get to know a country by experiencing its culture	49%	67
I like to explore places that are off the beaten path and less explored	33%	99
I'm willing to put in the effort while travelling in order to see lesser-known places	29%	71
I'm open to travelling to destinations with limited tourist infrastructure	19%	95
I'm open to visiting destinations with challenging climates or weather conditions	14%	79





# SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

- We travel primarily with our partner, sometimes with our kids and extended family.
- Our budgets are fairly conservative.



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	62%	106
Adult relatives	35%	126
Kids	14%	94
Friends	11%	78
Solo	9%	95



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

# \$1,810

71  
INDEX SCORE

### SPEND STYLE

Value to Mid-range



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	51%	75
I consider the impact that I personally have on the destinations I visit	41%	76
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	32%	83
Hearing from underrepresented communities is an important part of travelling	26%	75
It's important for me to know that the money I spend will support the local economy I'm visiting	23%	85

# 41%

## PRIORITIZE SUSTAINABLE TRAVEL

68 INDEX SCORE

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIORITIZE SUSTAINABLE TRAVEL** – The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."



# SIMPLICITY LOVERS

OUR BEHAVIOURS – TRAVEL ACTIVITIES



## OVERALL INSIGHT

- Our top activities include dining and exploring scenery. We also enjoy spas and saunas.
- We like to get outside for walks and appreciate being in nature.



## TOP DESIRED TRAVEL ACTIVITIES

		SCORE	INDEX
Local cuisine <ul style="list-style-type: none"> <li>○ Local restaurants</li> <li>○ Street cuisine</li> <li>○ Cafes or bakeries</li> </ul>		73%	114
		66%	118
		39%	106
		26%	96
Nature experiences <ul style="list-style-type: none"> <li>○ Oceanside beaches</li> <li>○ Fall colours</li> </ul>		49%	115
		34%	120
		20%	126
Health and wellness <ul style="list-style-type: none"> <li>○ Outdoor hot tub or bath</li> <li>○ Spas</li> </ul>		42%	109
		25%	109
		25%	97
Casual sports <ul style="list-style-type: none"> <li>○ Golfing</li> <li>○ Casual biking</li> </ul>		11%	100
		7%	104
		4%	112
Cultural experiences or attractions <ul style="list-style-type: none"> <li>○ Museums</li> <li>○ Historical or archeological sites</li> </ul>		50%	85
		26%	86
		25%	86
Shopping		30%	88
Family-focused attractions		29%	96
Festivals and events		20%	65
Guided tours		16%	71
Overnight experiences		9%	78
Nightlife		7%	84
Water-based sports		4%	76



# SIMPLICITY LOVERS

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To relax and unwind	72%	142	65%	134
To escape from routine	75%	132	70%	145
To spend time with family	64%	114	65%	103
To be pampered	29%	95	31%	97
To have fun with friends	7%	74	11%	82
To seek solitude and isolation	15%	121	9%	118
To check off dream travel places	5%	62	9%	69
To learn through other cultures	16%	78	21%	100
For a romantic getaway	6%	92	2%	85



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Family / friends wanted to go	50%	90	52%	79
Partner / spouse wanted to go	44%	88	49%	93
Kids wanted to go	26%	90	27%	91
Work dictates destinations	20%	92	16%	83
Visiting friends / family	15%	77	16%	77
Special event (e.g., wedding, reunion)	10%	59	12%	82

**18%** 89  
INDEX SCORE

Travel aligns with  
children's school schedule

**31%** 65  
INDEX SCORE

Take time off for vacation  
during major holidays

**32%** 120  
INDEX SCORE

Difficult to take more than a  
few days of vacation at once



# SIMPLICITY LOVERS

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- We plan with little notice, as we take short trips. We often use travel booking sites / apps.

# 53%

**Primary Trip Planner**

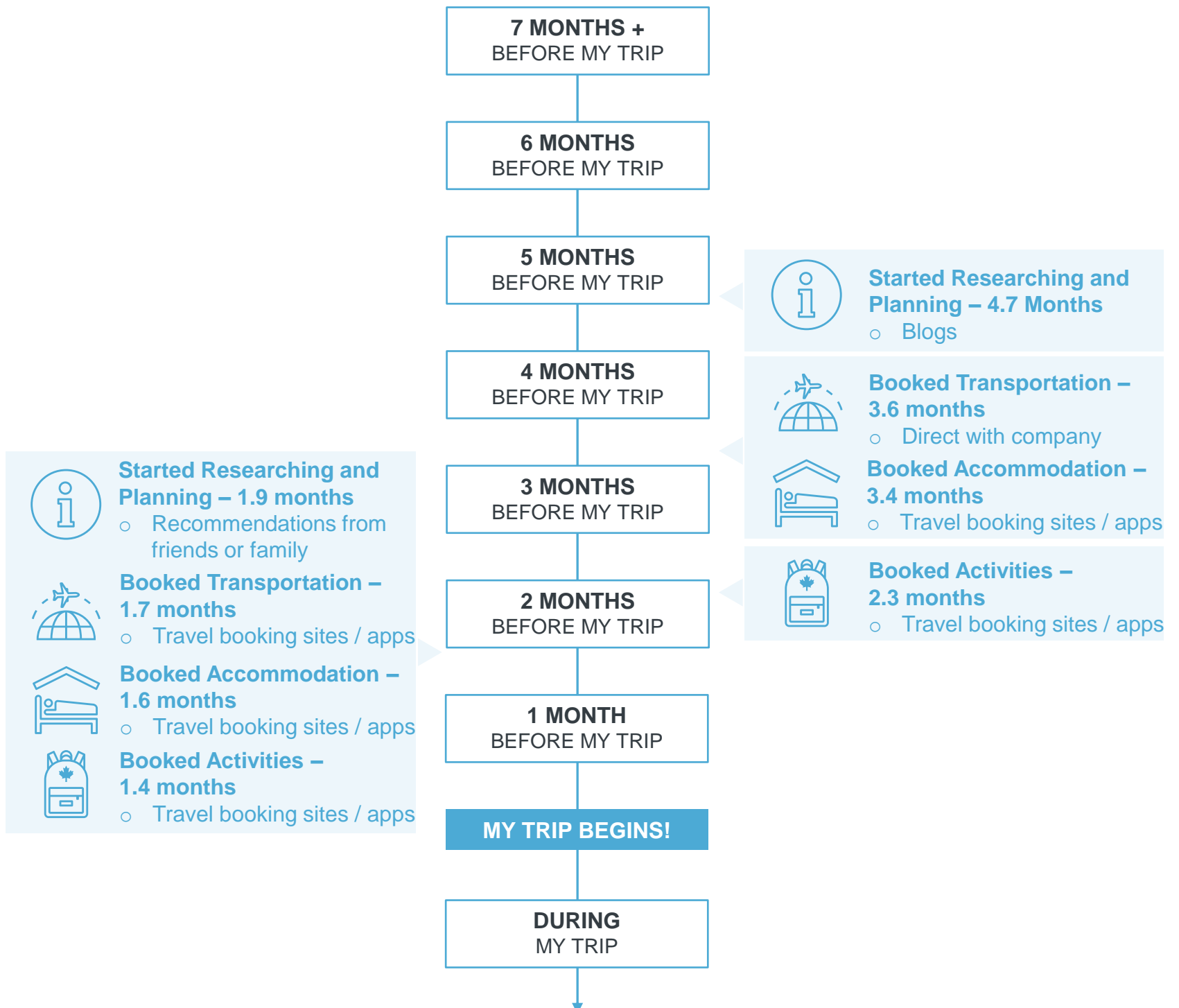
**73**  
INDEX SCORE

**!** **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
**3–7 HOURS**

FLIGHT OF  
**7+ HOURS**





# SIMPLICITY LOVERS

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips visit quiet and relaxing destinations where we can spend quality time with our travel group.
- We also take trips like City Trippers.

**!** KEY terminology on this page (for additional details and definitions see [Glossary](#))

- **SEGMENT ALIGNMENT** – The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**34%** 133  
INDEX SCORE



TRIP TYPE	Extended Family		
DESTINATION TYPE	Beach resort	19%	
	Urban centre	18%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
	Local restaurants		59%
	Cafes or bakeries		20%
KEY BEHAVIOURS	Budget-friendly peaceful and safe destination to gather with extended family		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**11%** 116  
INDEX SCORE



TRIP TYPE	Island Getaway		
COMPANIONS	Extended family	43%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
	Oceanside beaches		57%
	Local restaurants		46%
ACTIVITIES	Nature walks		19%
	Larger family group to a charming and safe destination. Perhaps staying in a cabin or lodge		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**12%** 121  
INDEX SCORE



TRIP TYPE	Small Cities & Towns		
COMPANIONS	Couple only	36%	
	Extended family	30%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
	Local restaurants		66%
	Oceanside beaches		32%
ACTIVITIES	Nature walks		15%
	Peaceful destination away from crowds. Low impact activities. Maybe staying in a lodge		

% OF TOTAL TRIPS

SEGMENT ALIGNMENT

**23%** 167  
INDEX SCORE



TRIP TYPE	Urban Centre		
COMPANIONS	Extended family	32%	
	Couple only	31%	
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
	Local restaurants		69%
	Cafes or bakeries		42%
ACTIVITIES	Street cuisine		38%
	An escape to a well-developed destination with famous attractions. Immersing in cuisine		







# SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- We likely have not been to Canada before, and do not know too much about it as a travel destination.
- We are most likely to be aware of British Columbia.
- We are not likely to consider Canada in the next two years.

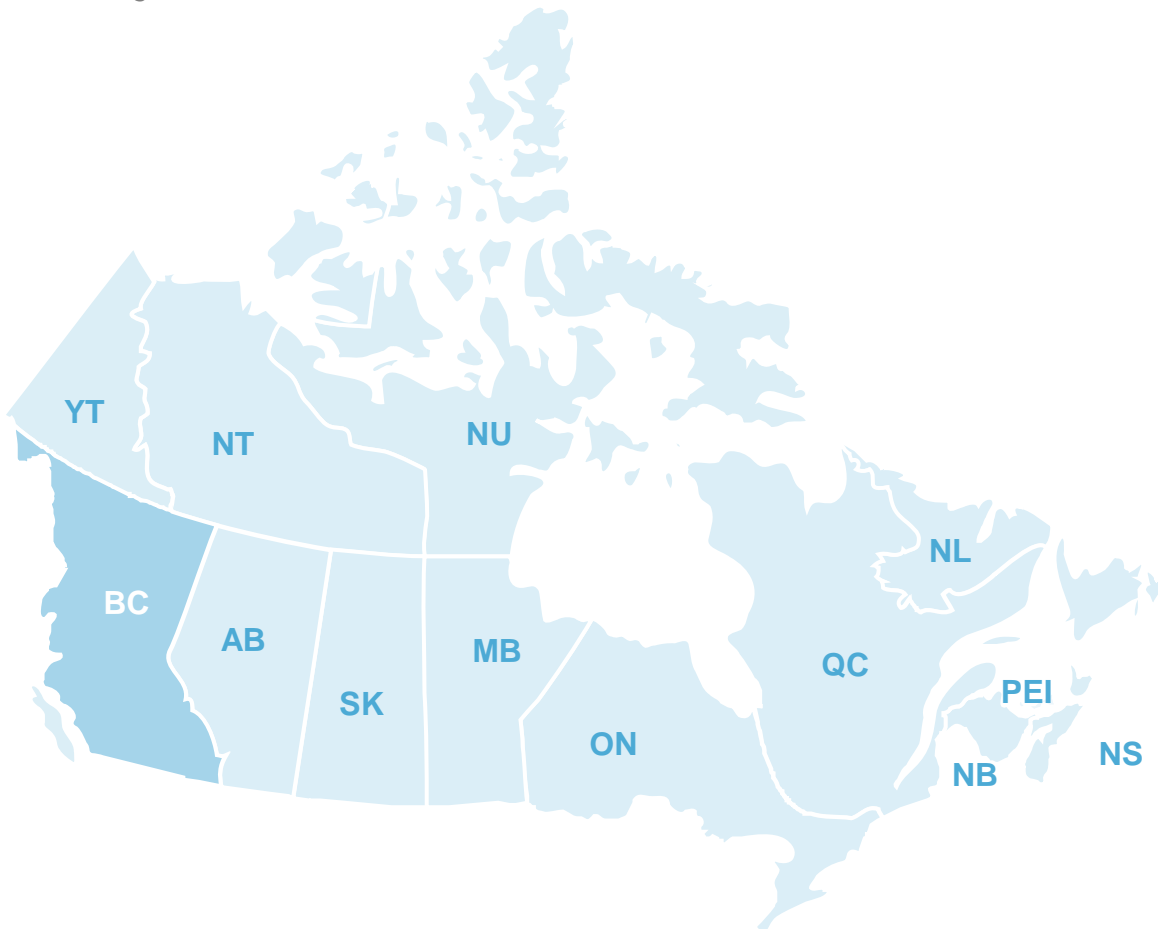


## WHERE DO WE WANT TO GO IN CANADA



## PROVINCES WE HAVE VISITED BEFORE

Amongst Prior Canada Travellers



PROVINCES	%	INDEX
AB	3%	69
BC	33%	117
MB	0%	68
NB	0%	69
NL	0%	65
NS	0%	70
NT	0%	68
NU	6%	96
ON	28%	100
PEI	0%	66
QC	26%	84
SK	0%	69
YT	3%	94



# SIMPLICITY LOVERS

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

- For those of us who have visited, it was likely one time a number of years ago.
- If we have visited, it may have been in the fall season to avoid crowds and take advantage of affordable options.



## CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
SIMPLICITY LOVERS	24%	26%	24%	35%
VS. TOTAL MARKET	23%	30%	28%	30%

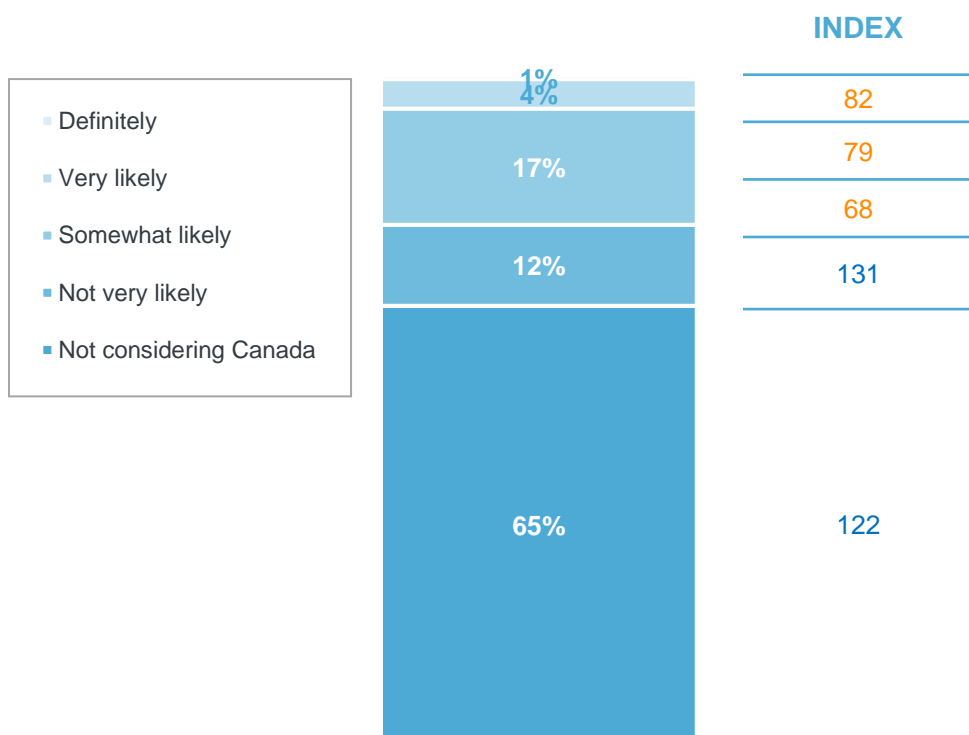
# 3%

Been to Canada in last 5 years

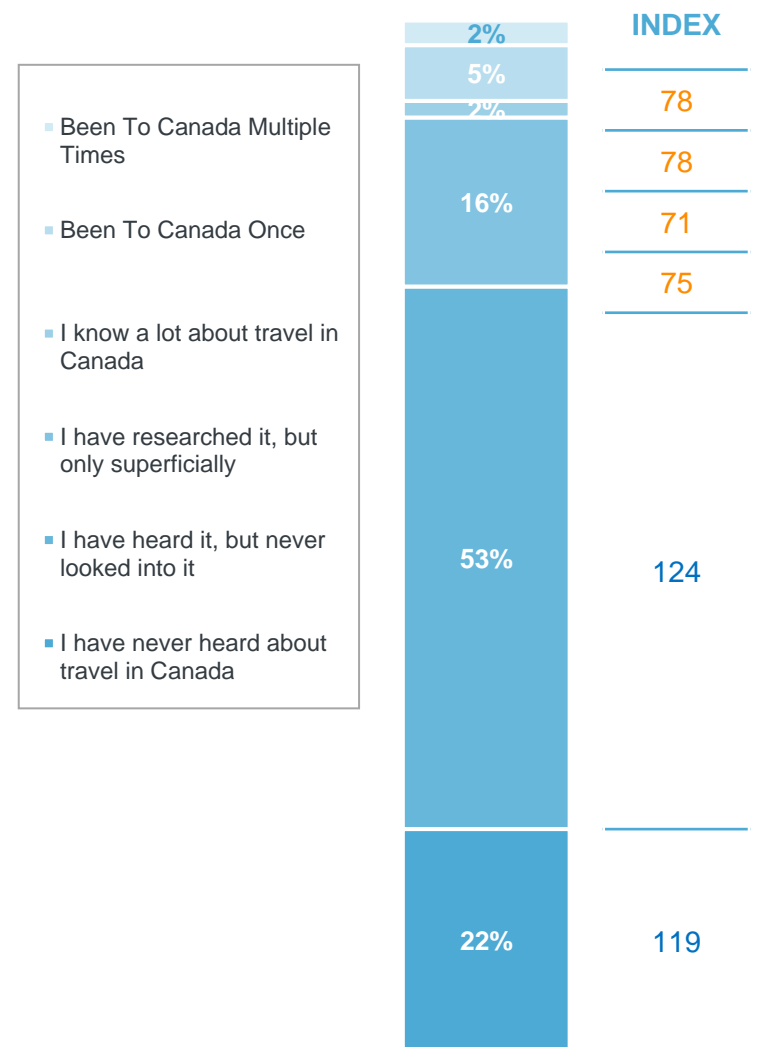
72 INDEX SCORE



## LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



## FAMILIARITY WITH CANADA





# SIMPLICITY LOVERS

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

- While many of us are retired, some of us have entered this life stage recently.
- In our retirement we are prioritizing our spending on our homes and continuing to build our savings.



### MAJOR LIFE EVENTS IN LAST 5 YEARS

# 2%

Had a child

96 INDEX SCORE

# 25%

Started a new job / career

88 INDEX SCORE

# 18%

Bought a new home

103 INDEX SCORE

# 16%

Moved to a new city

91 INDEX SCORE

# 16%

Child started school

97 INDEX SCORE

# 31%

Purchased a car

71 INDEX SCORE

# 9%

Retired

111 INDEX SCORE

# 33%

Renovated house

71 INDEX SCORE



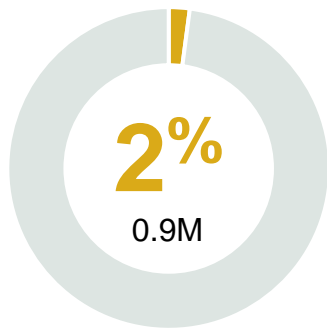
### NON-ESSENTIAL SPENDING PRIORITIES

	SCORE	INDEX
Savings and investments	76%	136
Travel	66%	86
Personal care and wellness	52%	127
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	40%	90
Fashion and accessories	25%	73
Technology and gadgets	19%	106



# FUN & SUN FAMILIES

PSYCHOGRAPHICS – SUMMARY



## % OF SOUTH KOREA POPULATION

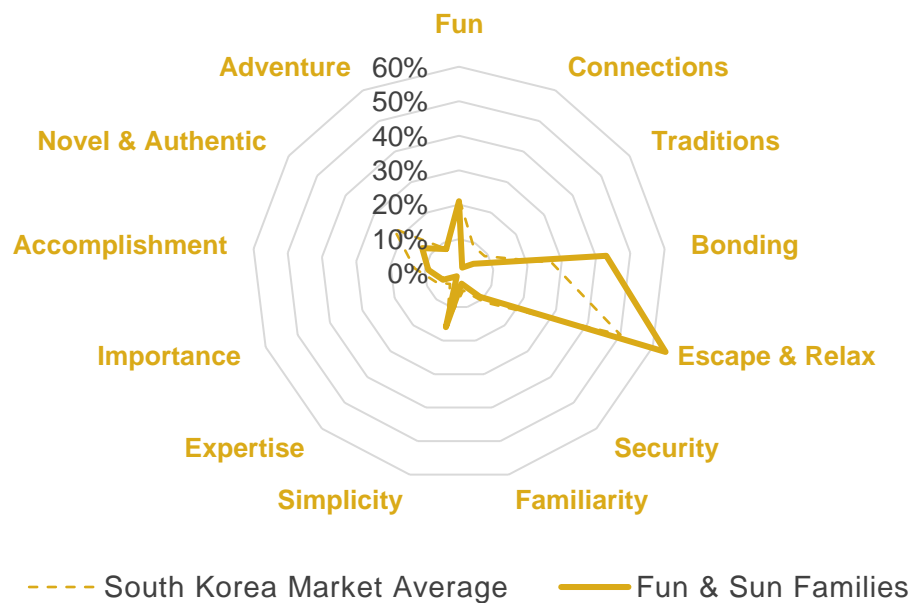
We cherish relaxation and shared family experiences in familiar, kid-friendly, and affordable destinations. We prioritize fun and simplicity over extravagance, gravitating towards well-known beaches and local spots with good communication standards.

Our big family trips are often domestic, and focus on creating lasting memories through simple, enjoyable activities guided by our children's interests.

### WHAT YOU NEED TO KNOW ABOUT ME

- 1** We prioritize affordable, kid-friendly destinations that offer relaxation and shared family experiences.
- 2** Our trips are short, often under 1 week long. We plan with little notice, and take significant cues from social media and influencers.
- 3** Destinations built for tourism, offering safe and reliable experiences and weather, make planning easier.
- 4** While we generally prefer to stay in our comfort zone, we are excited to explore famous attractions and shopping when we travel.

### EMOTIONAL TRAVEL MOTIVATIONS MAP



### TRAVELLER RESPONSIBLE INDEX

**73**

#### How is this calculated?

The responsible values index incorporates views on socio-cultural, environmental, and economic sustainability, as well as diversity, reconciliation, and desire to learn. The score is relative to the rest of the market to allow for comparison



### TRAVELLER ECONOMIC INDEX

**77**

#### How is this calculated?

The economic values index measures positive impact on Canada's tourism economy. Attributes include economic means, Canada trip recency / frequency / likelihood, hotel and flight behaviours, trip spend behaviour, and likelihood to make travel decisions within their own household. The score is relative to the rest of the market to allow for comparison



# FUN & SUN FAMILIES

OUR PSYCHOGRAPHICS – TRAVEL VALUES



## OVERALL INSIGHT

- We seek comfortable, entertaining destinations to enjoy quality time together with family.
- Well-known destinations built for tourism with mild climates make for easy planning and a reliable experience.
- We focus on the present moment, and escaping everyday life is our form of indulgence.



## TRAVEL VALUES & ATTITUDES

	SCORE	INDEX
I generally only choose destinations with comfortable climate and weather conditions	90%	133
I generally avoid places that are challenging or difficult to reach	90%	123
I prefer destinations with well-established tourist infrastructure	86%	119
I will generally not go out of my way to buy local when travelling	84%	127
I appreciate diversity but not likely engage deeply with Indigenous cultures	84%	137
I don't generally seek out luxury experiences while travelling	82%	133
I like to be able to take my time at a historic site or in a museum and not feel rushed	75%	141
I will generally not pay more or go out of my way to make eco-friendly choices when travelling	73%	125
While travelling I generally stick to places that are direct and convenient to get to	72%	131
I generally don't try to learn local languages	66%	145
I'm more interested in the present and don't focus much on the history of where I visit	52%	128
You can get to know a country without experiencing its culture	52%	136
It's not important to me that I come back from travels having learnt something new	44%	132



## EMOTIONAL MOTIVATIONS

	SCORE	INDEX
To let loose and forget about day-to-day life	76%	121
To find much-needed time to relax	67%	140
To just enjoy myself and have fun	61%	115
To escape the demands of everyday life	55%	125
To share quality time with others	51%	148
To bond through shared experiences	36%	136



## DESIRED DESTINATION

	SCORE	INDEX
Fun	68%	129
Carefree	43%	132
Friendly	39%	143
Relaxed	37%	121
Free-Spirited	30%	126
Trendy	18%	110



# FUN & SUN FAMILIES

OUR DEMOGRAPHICS



## OVERALL INSIGHT

- We are aged 35-54, with at least one child.
- We are likely to be male.
- We are primarily employed earning a medium-high income.



### AGE

	SCORE	INDEX
18-34	16%	84
35-54	74%	151
55+	10%	57
MEAN YEARS	43.4	77



### HH INCOME (CAD)\*

	SCORE	INDEX
Less than \$2.5K	18%	86
\$2.5K to <\$8K	70%	131
\$8K or more	7%	88
Refused	5%	131

\* HH Income reported by month



### EMPLOYMENT

	SCORE	INDEX
Employed FT	61%	126
Employed PT	9%	149
Self-employed	10%	88
Retired	3%	71



### EDUCATION

	SCORE	INDEX
Primary education or less	0%	72
Secondary education	11%	73
Post-secondary education	89%	129



**53%**

60 Have a valid passport



### GENDER

**49%**

80 Male

**51%**

120 Female

**0%**

Non-binary / Other



### HOUSEHOLD

**84%**

146 Children <18 Living At Home\*

**8%**

59 Children 18+ Living At Home\*

**5%**

65 Children NOT Living At Home\*

**11%**

53 No Children

\* Option is not exclusive



## SOUTH KOREA CITY BREAKOUT

	SCORE	INDEX
Gyeonggi-do	33%	111
Seoul	26%	140
Chungcheongnam-do	10%	156
Gyeongsangnam-do	10%	132
Gyeongsangbuk-do	7%	108
Busan	6%	108

	SCORE	INDEX
Jeollanam-do	4%	132
Gwangju	2%	98
Chungcheongbuk-do	2%	51
Jeollabuk-do	1%	52
Gangwon-do	1%	54





# FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL HABITS



## TRAVEL TRADE INDEX: NON-GROUP

69

## TRAVEL TRADE INDEX: GROUP

104

**!** KEY terminology on this page

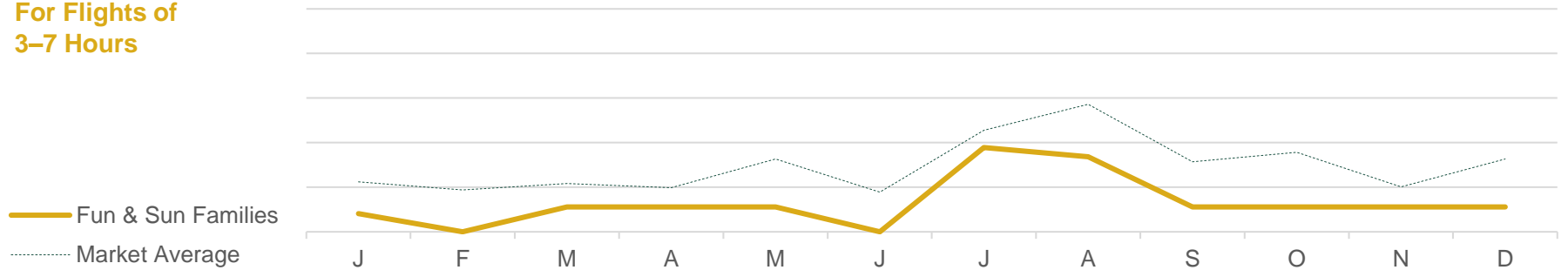
- **TRAVEL TRADE INDEX – NON-GROUP** – The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).
- **TRAVEL TRADE INDEX – GROUP** – The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables covering both overall preference and the specific makeup of their next planned trip

For additional definitions see [Glossary](#)

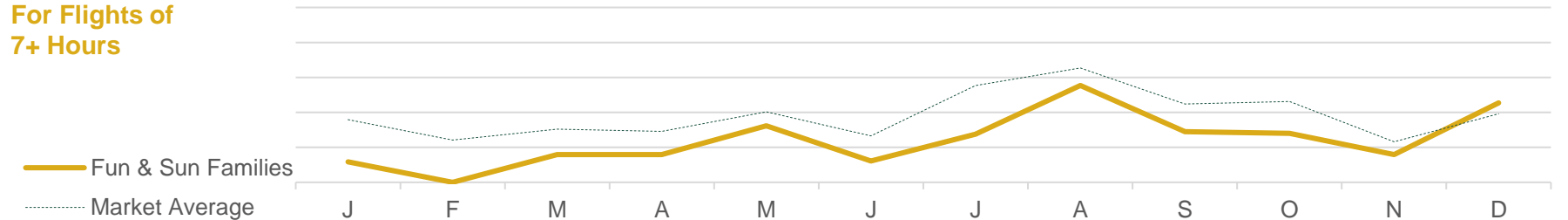


## TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



## TRIP DURATION

INDEX

Duration	Percentage	Index
1-2 Days	61%	124
3-5 Days	29%	105
1 Week Holiday	2%	71
2 Weeks Holiday	1%	72
3 Weeks Or More	0%	68

*Incidence is frequency of 2+ times per year*



## TRIP TYPE

INDEX

Trip Type	Percentage	Index
Domestic Leisure	65%	112
International Leisure	9%	68
Business Trip	20%	114
Added Personal To Business	5%	83
Worked During Vacation	0%	67

*Incidence is frequency of 2+ times per year*



# FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE TRAVEL HABITS



## TYPICAL ACCOMMODATION

	SCORE	INDEX
Mid-priced Hotel	53%	81
Recreation-based lodge or resort (e.g., cabins / cottages, ranch, farm, etc.)	45%	154
All-inclusive resort	19%	122
Bed & Breakfast	15%	100
Premium Hotel	14%	90
Vacation Rental (e.g., Airbnb, Vrbo)	9%	87



## THOUGHTS ON INDIGENOUS TRAVEL

# 17%

63 INDEX SCORE

**I'd look for opportunities to hear stories and engage with the Indigenous people / original inhabitants of the places I visit**

# 9%

93 INDEX SCORE

**Strong Interest In Indigenous Activities**



## WILLINGNESS TO LEARN AND EXPLORE

	SCORE	INDEX
You only ever get to know a country by experiencing its culture	48%	64
I really want to learn about the history of the destinations I visit	48%	72
I'm willing to put in the effort while travelling in order to see lesser-known places	28%	69
I like to explore places that are off the beaten path and less explored	27%	88
I'm open to travelling to destinations with limited tourist infrastructure	14%	81
I'm open to visiting destinations with challenging climates or weather conditions	10%	67



# FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL STYLE



## OVERALL INSIGHT

- We primarily travel with our immediate family, and sometimes extended family.
- We keep budgets conservative.



## TRAVEL COMPANIONS

	SCORE	INDEX
Spouse / Partner	83%	149
Kids	78%	154
Adult relatives	21%	70
Friends	11%	78
Other	1%	52



## BUDGET

### AVERAGE SPEND (ALL TRIPS)

# \$2,080

83

INDEX SCORE

### SPEND STYLE

Mid-range to Premium



## OUR THOUGHTS ON RESPONSIBLE TRAVEL

	SCORE	INDEX
It's important to me that I visit somewhere that is open to diversity and inclusion	59%	95
I consider the impact that I personally have on the destinations I visit	40%	74
Hearing from underrepresented communities is an important part of travelling	28%	78
I am committed to sustainable travel and actively take steps to minimize my impact on the environment when travelling	27%	75
It's important for me to know that the money I spend will support the local economy I'm visiting	17%	73

# 48%

## PRIORITIZE SUSTAINABLE TRAVEL

81 INDEX SCORE

! **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIORITIZE SUSTAINABLE TRAVEL** – The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage."



# FUN & SUN FAMILIES

OUR BEHAVIOURS – TRAVEL ACTIVITIES



## OVERALL INSIGHT

- Family focussed attractions are the #1 priority.
- We like to explore local cuisine and shopping, and explore various outdoor attractions, from parks to water sports.



## TOP DESIRED TRAVEL ACTIVITIES

		SCORE	INDEX
	Family-focused attractions	80%	150
	○ Amusement parks or theme parks	61%	149
	○ Zoos or aquariums	61%	153
	○ Space or science centres	23%	144
	Nature experiences	57%	137
	○ Oceanside beaches	43%	147
	○ Visiting nature parks or preserves	29%	144
	Shopping	45%	116
	○ Outdoor markets	28%	118
	○ Visiting famous shopping centres or areas	25%	107
	Water-based sports	12%	107
	○ Scuba diving or snorkeling	9%	131
	○ Sailing or boating	4%	136
	Local cuisine	57%	88
	○ Local restaurants	46%	85
	○ Street cuisine	28%	80
	Cultural experiences or attractions	54%	94
	Health and wellness	33%	74
	Festivals and events	33%	96
	Guided tours	20%	86
	Casual sports	6%	78
	Nightlife	6%	79
	Overnight experiences	2%	46



# FUN & SUN FAMILIES

OUR BEHAVIOURS – WHY WE TRAVEL



## INTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
To spend time with family	96%	153	94%	143
To escape from routine	71%	120	53%	91
To relax and unwind	71%	141	42%	78
To be pampered	16%	58	39%	116
To check off dream travel places	5%	62	0%	43
To have memories from top travel spots	0%	55	14%	101
To have fun with friends	14%	101	20%	112
To learn through other cultures	18%	88	31%	145
To seek solitude and isolation	0%	61	0%	65



## EXTERNAL TRIP TRIGGERS

	TRIPS OF FLIGHTS OF 3–7 HOURS		TRIPS OF FLIGHTS OF 7+ HOURS	
	SCORE	INDEX	SCORE	INDEX
Kids wanted to go	76%	153	74%	143
Family / friends wanted to go	74%	131	62%	116
Partner / spouse wanted to go	62%	142	75%	140
Festival or event	33%	114	25%	83
Special event (e.g., wedding, reunion)	17%	88	8%	74
Work dictates destinations	17%	78	31%	127

**54%** 148  
INDEX SCORE

Travel aligns with  
children's school schedule

**46%** 126  
INDEX SCORE

Take time off for vacation  
during major holidays

**38%** 147  
INDEX SCORE

Difficult to take more than a  
few days of vacation at once



# FUN & SUN FAMILIES

OUR BEHAVIOURS – HOW WE PLAN



## OVERALL INSIGHT

- As our trips are short, we plan on short notice, using social media and review sites as inspiration.

# 50%

**Primary Trip Planner**

62  
INDEX SCORE

! **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **PRIMARY TRIP PLANNER** – The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.

FLIGHT OF  
**3–7 HOURS**

FLIGHT OF  
**7+ HOURS**

**7 MONTHS +  
BEFORE MY TRIP**

**6 MONTHS  
BEFORE MY TRIP**

**5 MONTHS  
BEFORE MY TRIP**

**4 MONTHS  
BEFORE MY TRIP**

**3 MONTHS  
BEFORE MY TRIP**

**2 MONTHS  
BEFORE MY TRIP**

**1 MONTH  
BEFORE MY TRIP**

**MY TRIP BEGINS!**

**DURING  
MY TRIP**

\*The incidence of this traveller segment taking recent trips of the flight duration indicated above resulted in a base size too small for statistically reliable analysis.

\*The incidence of this traveller segment taking recent trips of the flight duration indicated above resulted in a base size too small for statistically reliable analysis.





# FUN & SUN FAMILIES

OUR BEHAVIOURS – TRIP TYPES



## OVERALL INSIGHT

- Our top trips feature beaches and destinations known for family attractions.
- We also take trips like Simplicity Lovers or City Trippers.

**!** **KEY** terminology on this page (for additional details and definitions see [Glossary](#))

- **SEGMENT ALIGNMENT** – The degree to which actual trip aligns with a segments idealized trip across a variety of factors including emotional motivations, trip triggers, desired destination personality, and travel activities.

% OF TOTAL TRIPS

**26%** 176 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Beach Resort		
COMPANIONS	Nuclear family with kids		61%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants		53%
	Oceanside beaches		42%
	Souvenir shopping		25%
KEY BEHAVIOURS	Resort destination offering a peaceful, safe, and relaxing place to be outdoors with the family		

% OF TOTAL TRIPS

**8%** 105 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Countryside & Village		
COMPANIONS	Nuclear family with kids		52%
	Extended family		37%
TRIP EMOTIONAL MOTIVATIONS	Fun	Escape & Relax	Simplicity
ACTIVITIES	Zoos or aquariums		47%
	Local restaurants		44%
	Street cuisine		36%
KEY BEHAVIOURS	Easy kid-focussed fun. Smaller town with lodge or cottage accommodation		

% OF TOTAL TRIPS

**9%** 110 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Island Getaway		
COMPANIONS	Extended family		43%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Oceanside beaches		57%
	Local restaurants		46%
	Nature walks		19%
KEY BEHAVIOURS	Larger family group to a charming and safe destination. Perhaps staying in a cabin or lodge		

% OF TOTAL TRIPS

**12%** 122 INDEX SCORE

SEGMENT ALIGNMENT



TRIP TYPE	Urban Centre		
COMPANIONS	Extended family		32%
	Couple only		31%
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants		69%
	Cafes or bakeries		42%
	Street cuisine		38%
KEY BEHAVIOURS	An escape to a well-developed destination with famous attractions. Immersing in cuisine		





# FUN & SUN FAMILIES

OUR BEHAVIOURS – THOUGHTS ON CANADA



## OVERALL INSIGHT

- We likely have not been to Canada before, and are unlikely to be considering Canada in the next few years.



## WHERE DO WE WANT TO GO IN CANADA

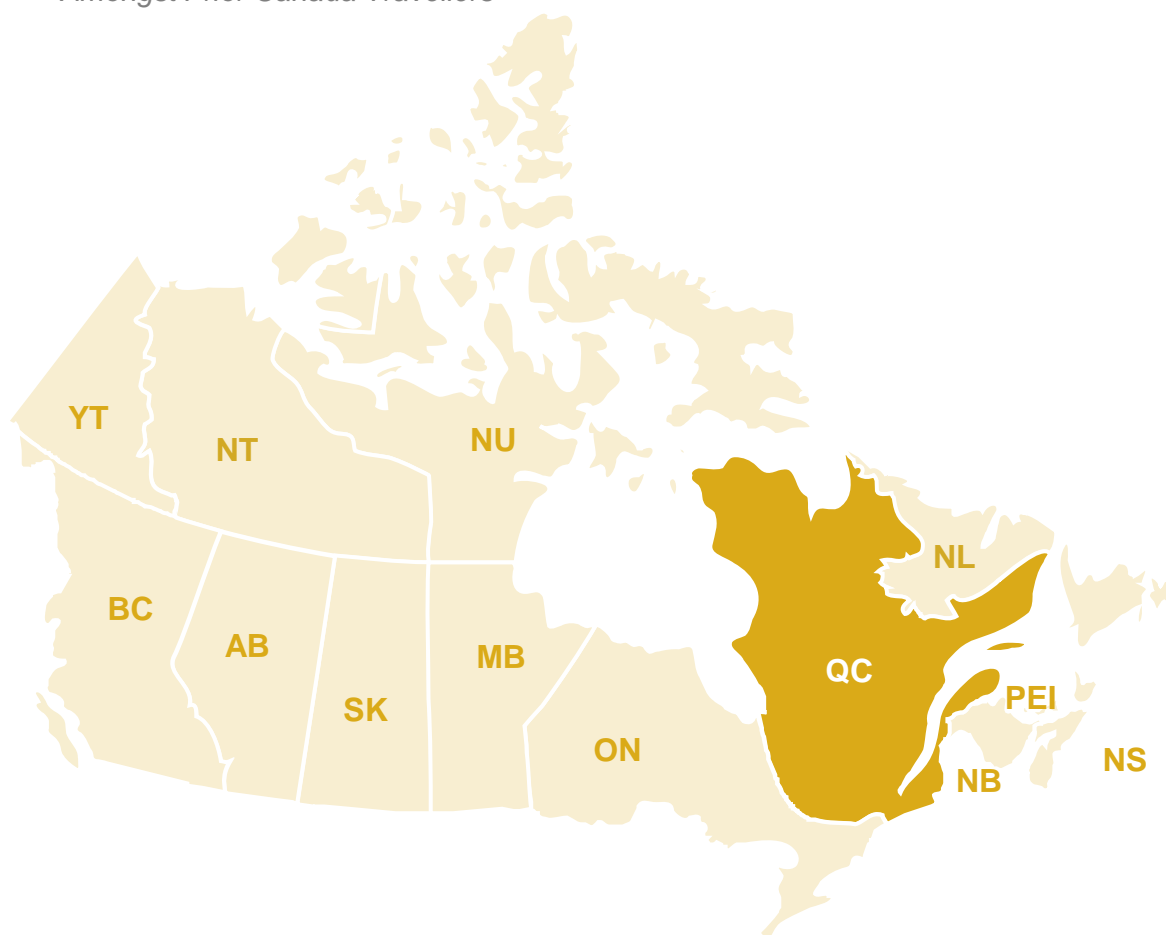
CALGARY

VANCOUVER



## PROVINCES WE HAVE VISITED BEFORE

*Amongst Prior Canada Travellers*



PROVINCES	%	INDEX
AB	0%	57
BC	23%	93
MB	0%	68
NB	0%	69
NL	0%	65
NS	0%	70
NT	0%	68
NU	0%	62
ON	0%	40
PEI	0%	66
QC	77%	157
SK	0%	69
YT	0%	63



# FUN & SUN FAMILIES

OUR BEHAVIOURS – MORE THOUGHTS ON CANADA



## OVERALL INSIGHT

○ Overall we have little awareness of Canadian travel opportunities.



### CANADA TRAVEL MONTHS ON A PAST TRIP

	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
FUN & SUN FAMILIES	78%	0%	23%	0%
VS. TOTAL MARKET	23%	30%	28%	30%

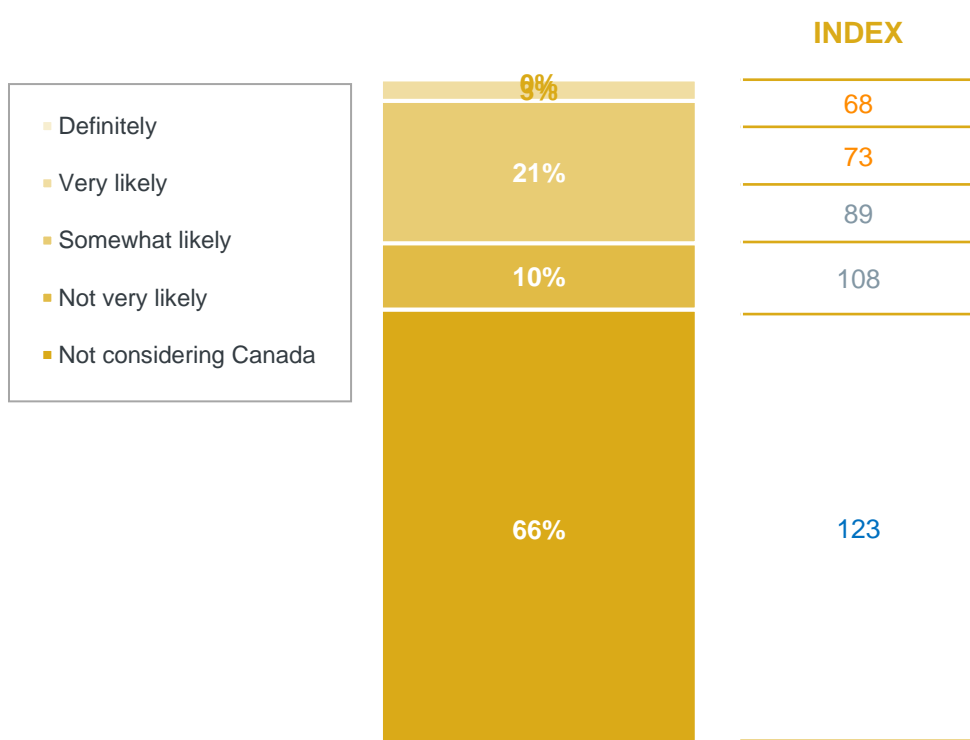
# 2%

Been to Canada in last 5 years

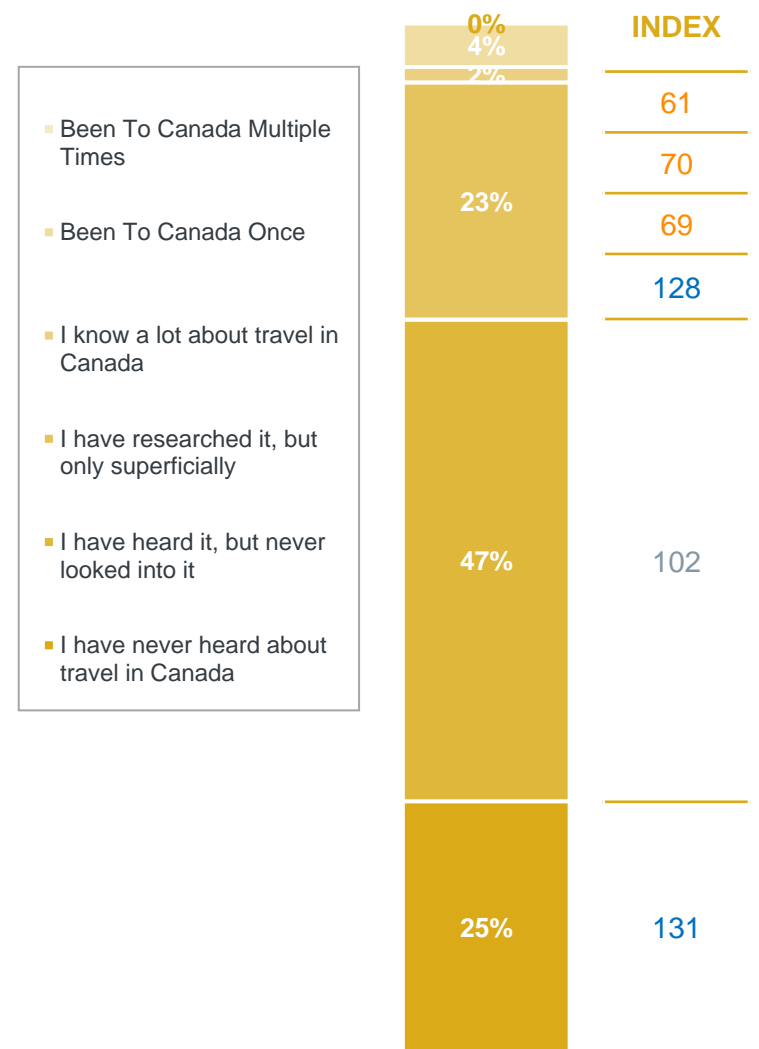
69 INDEX SCORE



### LIKELIHOOD TO VISIT CANADA NEXT 2 YEARS



### FAMILIARITY WITH CANADA





# FUN & SUN FAMILIES

OUR BEHAVIOURS – LIFE OUTSIDE TRAVEL



## OVERALL INSIGHT

- Outside of spending on priority items that come with a growing family (like homes and vehicles), our primary focus is building our savings.
- If we did not just have a child, our young children are transitioning from daycare to school life.



### MAJOR LIFE EVENTS IN LAST 5 YEARS

# 19%

Had a child

158 INDEX SCORE

# 31%

Started a new job / career

124 INDEX SCORE

# 40%

Bought a new home

158 INDEX SCORE

# 19%

Moved to a new city

111 INDEX SCORE

# 46%

Child started school

152 INDEX SCORE

# 44%

Purchased a car

131 INDEX SCORE

# 3%

Retired

66 INDEX SCORE

# 40%

Renovated house

104 INDEX SCORE



### NON-ESSENTIAL SPENDING PRIORITIES

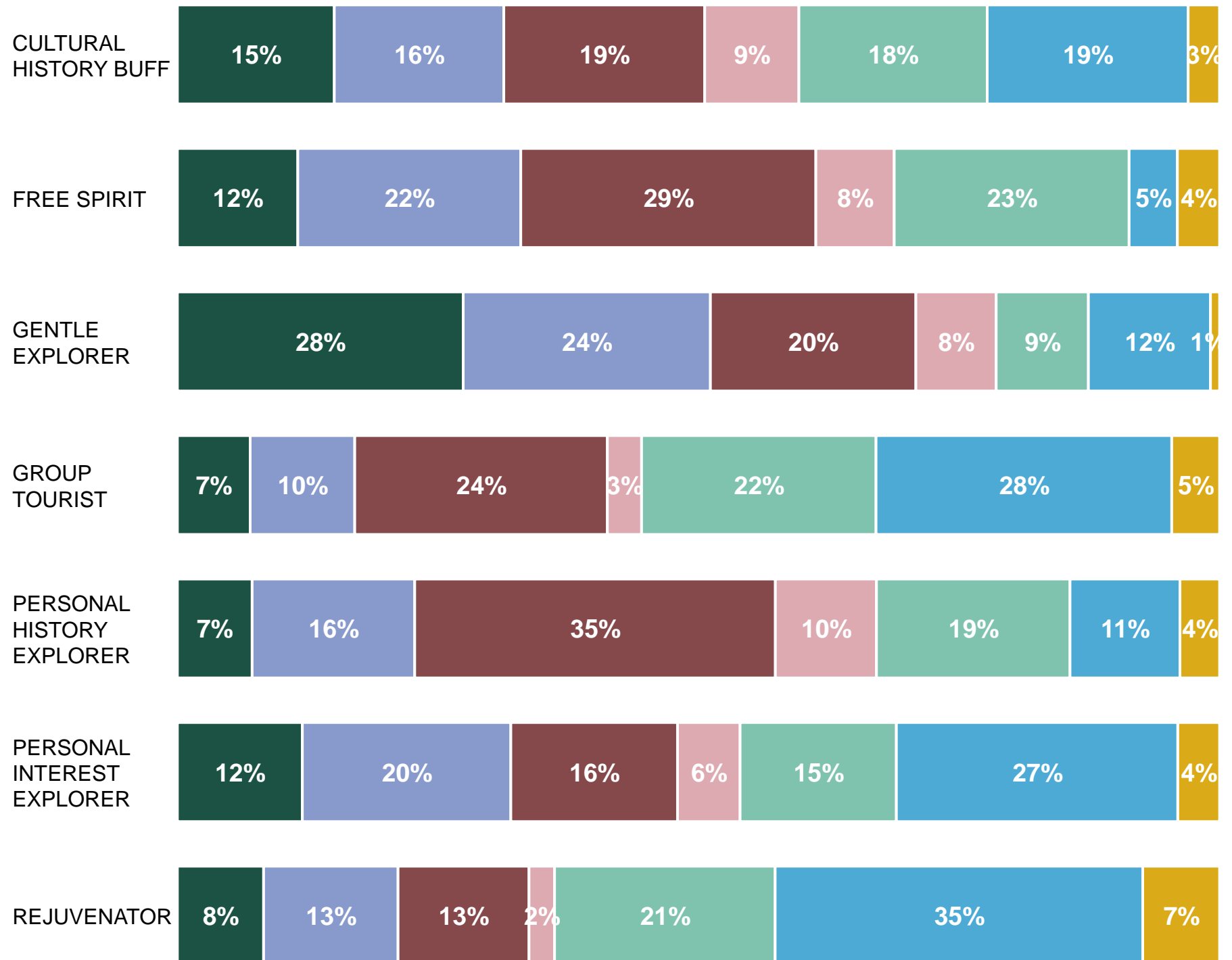
	SCORE	INDEX
Savings and investments	77%	140
Travel	68%	99
Personal care and wellness	45%	84
Fashion and accessories	31%	99
Personal hobbies and interests (e.g., sports equipment, books, art supplies)	30%	54
Technology and gadgets	21%	125



# EXPLORER QUOTIENT MAPPING

## MARKET LEVEL SEGMENT DISTRIBUTION ACROSS EQ SEGMENTS

This page provides insights into how the new traveller segments disperse across historical EQ segments in this market.







# GLOSSARY

## DETAILS AND DEFINITIONS

<b>DESIRED DESTINATION</b>	How a traveller describes the personality of an ideal destination.	
<b>DESTINATION CANADA PRIORITY SEGMENT</b>	Traveler segments prioritized by Destination Canada for targeted marketing and strategic efforts due to the opportunity they provide to contribute significantly to the Canadian tourism landscape. Aligning with these segments enables tourism partners to effectively coordinate with the national tourism strategy and maximizing their impact.	
<b>EMOTIONAL TRAVEL MOTIVATIONS</b>	Key travel motivations derived from factor analysis, which condensed 25 initial statements into 13 primary motivations. These insights help industry researchers and marketers better understand travellers' emotional drivers, which may influence overall travel behaviours including the choice of destination, activities, and experiences during the journey	
<b>EMOTIONAL TRAVEL MOTIVATION: ACCOMPLISHMENT</b>	This travel motivation is about achieving personal goals and overcoming challenges during travel. These travellers seek destinations and activities that promote self-discovery and personal growth, pushing their limits to feel a sense of accomplishment.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To feel like I've accomplished something.</i></li> <li>• <i>To push my limits and challenge myself.</i></li> </ul>
<b>EMOTIONAL TRAVEL MOTIVATION: ADVENTURE</b>	This travel motivation is about seeking thrill and excitement through adventurous activities. Travellers who seek adventure are often energized by a physical and emotional rush and they often proudly share their experiences with others.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To have experiences I am proud to tell others about.</i></li> <li>• <i>To feel a sense of adventure.</i></li> </ul>
<b>EMOTIONAL TRAVEL MOTIVATION: BONDING</b>	This travel motivation focuses on spending quality time with travel companions, particularly partners and family members. Travellers motivated by bonding cherish creating lasting memories through shared experiences with their loved ones.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To share quality time with others.</i></li> <li>• <i>To bond and create lasting memories through shared experiences.</i></li> </ul>
<b>EMOTIONAL TRAVEL MOTIVATION: CONNECTIONS</b>	This travel motivation is about building relationships and forming connections with new and interesting people. Travellers motivated by connections look for opportunities to engage with locals or other visitors on their travels.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To feel connected with new people.</i></li> </ul>
<b>EMOTIONAL TRAVEL MOTIVATION: ESCAPE &amp; RELAX</b>	This travel motivation signifies a desire to escape daily routines and simply relax during vacation. Travellers motivated by escape and relax often seek solitude, tranquility, and rejuvenation in peaceful destinations.	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To escape the demands of everyday life.</i></li> <li>• <i>To find much-needed time to relax.</i></li> <li>• <i>To let loose and forget about day-to-day life.</i></li> </ul>



# GLOSSARY

## DETAILS AND DEFINITIONS

<p>EMOTIONAL TRAVEL MOTIVATION: <b>EXPERTISE</b></p>	<p>This travel motivation is about influence, status, and confidence. Travellers with this motivation like to be well versed in travel opportunities, so they can confidently navigate new environments, and take pride in being the expert among their peers</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To feel like a travel expert.</i></li> </ul>
<p>EMOTIONAL TRAVEL MOTIVATION: <b>FAMILIARITY</b></p>	<p>This travel motivation encompasses a diverse range of travellers looking for familiarity during their travels. Some seek the comfort of recognizable destinations and routines, enjoying the predictability of repeat travel. Others aim to immerse themselves in new places while feeling like they are not tourists, blending in and experiencing the local culture as if they were natives.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To be familiar with my surroundings.</i></li> <li>• <i>To feel like a local.</i></li> </ul>
<p>EMOTIONAL TRAVEL MOTIVATION: <b>FUN</b></p>	<p>This travel motivation is centered around the pure enjoyment of travel. The travellers motivated by fun prioritize activities and destinations that bring happiness and a sense of playfulness. They focus on living in the moment, indulging in joyful experiences, and seeking vibrant, social environments.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To just enjoy myself and have fun.</i></li> <li>• <i>To indulge myself and live in the moment.</i></li> <li>• <i>To have a fun, social setting.</i></li> </ul>
<p>EMOTIONAL TRAVEL MOTIVATION: <b>IMPORTANCE</b></p>	<p>This travel motivation is about the desire to feel important and admired. Travellers motivated by importance often choose popular, exotic, and luxury destinations to reflect their success and gain recognition.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To feel like I'm important.</i></li> </ul>
<p>EMOTIONAL TRAVEL MOTIVATION: <b>NOVEL &amp; AUTHENTIC</b></p>	<p>This travel motivation is driven by a desire for novelty in all its forms—new places, unique experiences, and fresh perspectives. The travellers motivated by novel and authentic seek originality in their journeys, immersing themselves in different cultures and engaging in genuine and authentic interactions.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To have authentic experiences.</i></li> <li>• <i>To open my mind to new perspectives.</i></li> <li>• <i>To explore and discover new things and places.</i></li> </ul>
<p>EMOTIONAL TRAVEL MOTIVATION: <b>SECURITY</b></p>	<p>This travel motivation is around prioritizing safety and predictability. Travellers motivated by security prefer well-planned trips, reliable accommodations, and destinations known for their safety.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To feel welcomed.</i></li> <li>• <i>To feel safe and secure.</i></li> </ul>



# GLOSSARY

## DETAILS AND DEFINITIONS

<b>EMOTIONAL TRAVEL MOTIVATION: SIMPLICITY</b>	<p>This travel motivation is about appreciating straightforward and easy travel experiences. Travellers motivated by simplicity prefer simpler trips with laid back itineraries and no surprises.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To enjoy the simplicity of easy, straightforward travel.</i></li> <li>• <i>To feel confident of no surprises; I'll get exactly what I expected.</i></li> </ul>
<b>EMOTIONAL TRAVEL MOTIVATION: TRADITIONS</b>	<p>This travel motivation is about seeking to engage in traditions, whether by a traveller participating in local cultural practices or creating their own travel traditions with family and friends.</p>	<p><i>Statement(s) included in the motivation:</i></p> <ul style="list-style-type: none"> <li>• <i>To create new, or take part in old, traditions.</i></li> </ul>
<b>FUNCTIONAL BENEFITS</b>	<p>Functional needs in travel pertain to the practical aspects necessary for a trip. These include affordable pricing, convenient transportation, comfortable accommodation, and reliable services. These needs are often about the logistics and practicalities of travel, ensuring the trip runs smoothly</p>	
<b>NON-TRAVELLER</b>	<p>Has not travelled a minimum of one night away in paid accommodation in past 5 years OR is actively planning to travel in next 2.</p>	
<b>PRIMARY TRIP PLANNER</b>	<p>The individual who makes all leisure travel decisions, including destination, accommodation, transportation, and activities, either independently or by leading most decisions. Those not in this role usually share decision-making with travel partners, contributing collaboratively to the planning.</p>	
<b>PRIORITIZE SUSTAINABLE TRAVEL</b>	<p>The percent of respondents who responded 5-7 on a 7-point scale in terms of prioritizing 'sustainable travel'. Sustainable travel is defined as "travel that minimizes any negative impact on the destination's environment, economy and society, while making positive contributions to the local people and conserving the destination's natural and cultural heritage.</p>	
<b>SEGMENT ALIGNMENT</b>	<p>Indicates how closely personal needs, motivations and travel behaviours on a specific trip type (e.g. long-haul trip, short-haul trip, family vacation, weekend getaway) align with the overall travel needs, motivations and behaviours that define the segment. For example, a travellers' personal needs (motivations and ideal trip specifics) may fully influence and define a long-haul trip to a bucket-list destination; however, these needs may not be a priority on a quick getaway with friends. This score provides insights into when traveller needs and behaviours shift by trip type and should be considered when targeting this segment for this type of trip</p>	
<b>SHORT / MID / LONG HAUL</b>	<p>Short Haul: Those who did not travel via flight or travelled on a less than 3 hours flight          Mid Haul: Those who travelled on a 3 to 7 hours flight          Long Haul: Those who travelled or 7+ hours flight</p>	



# GLOSSARY

## DETAILS AND DEFINITIONS

<b>TRAVELLER ECONOMIC INDEX</b>	An industry metric providing insight into a segment's propensity to have a positive impact on Canada's tourism economy. The score is derived from a selection of variables from the initial study that most represent a positive impact on the tourism economy. The included variables cover economic means, typical trip recency and frequency, propensity towards more luxury travel behaviours, and details about travel specifically to Canada. To reduce market specific bias and any variation in score composition across markets, the score is reported as an index
<b>TRAVELLER RESPONSIBLE INDEX</b>	An industry metric providing insight into a segment's alignment with Canada's responsible travel values. The score is derived from a selection of variables from the initial study that most represent responsible travel. The included variables cover traveller values across themes of socio-cultural, environmental, and economic sustainability, impact of tourism on a destination, visitor engagement with tourism communities, diversity, and inclusion. To reduce market specific bias and any variation in score composition across markets, the score is reported as an index in the segment profiles
<b>TRAVEL TRADE INDEX – GROUP</b>	The propensity to travel as part of an organized group indexed against the rest of the market. Measured by examining variables cover both overall preference and the specific makeup of their next planned trip
<b>TRAVEL TRADE INDEX – NON-GROUP</b>	The propensity to utilize travel agent / operator assisted channels for free independent travel indexed against the rest of the market. Measured by examining behaviours on ideal & future trips. Does not include self-directed online travel agencies (e.g. Expedia).