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

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

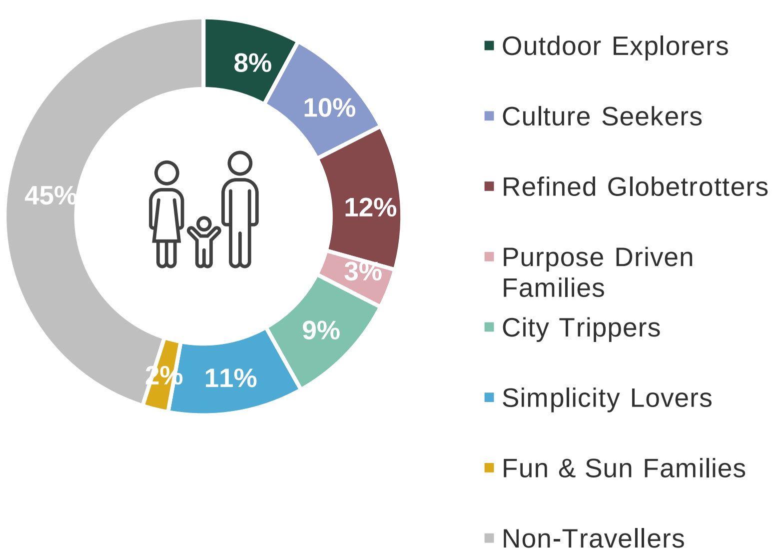
- Desire for unique experiences, whether it's adventure, cultural immersion, luxury, or family-friendly activities. Novelty is attractive.
- Well-developed tourism destinations, packaged offers, and popular attractions contribute to a sense of safety and reliability, which helps travellers focus on relaxing.
- 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 opportuntiy to relax and bond with loved ones.

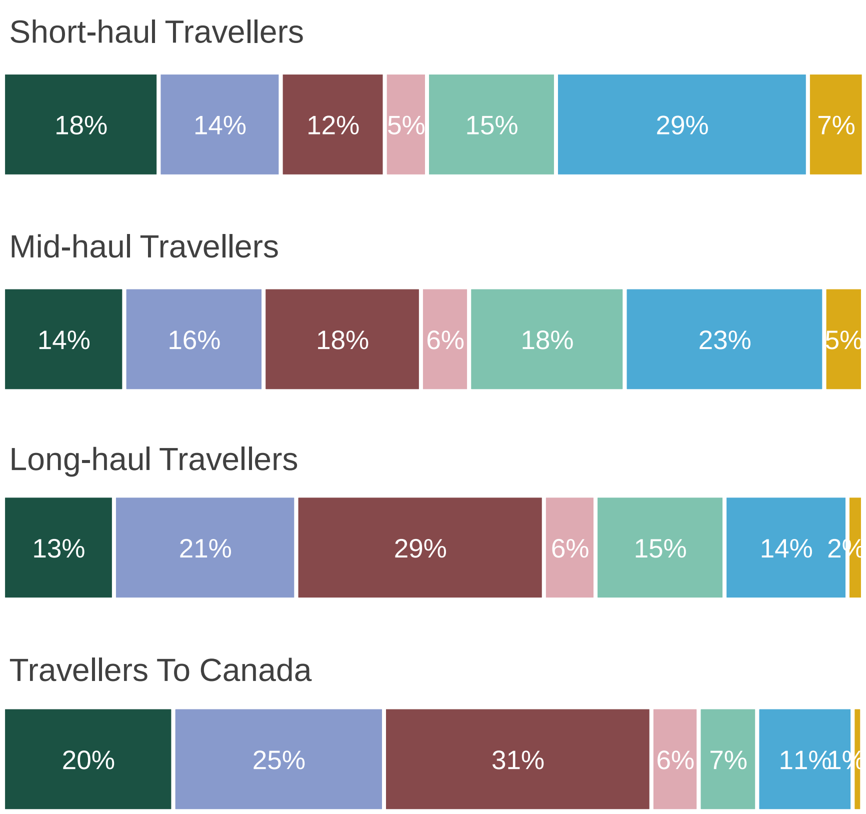
MARKET SIZING

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



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

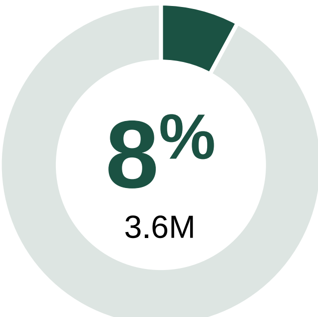
	Segment Size	Destination Canada Priority Segment	Top Travel Activities	Emotional Travel Motivations
OUTDOOR EXPLORERS	**3.6M**	**Yes**	○ Nature Experiences ○ Water Sports ○ Casual Sports	○ Adventure ○ Connections ○ Accomplishment
CULTURE SEEKERS	**4.2M**	No	○ Festivals & Events ○ Cuisine ○ Cultural Experiences & Attractions	○ Novel & Authentic ○ Connections ○ Accomplishment
REFINED GLOBETROTTERS	**5.4M**	**Yes**	○ Cuisine ○ Cultural Experiences & Attractions ○ Health & Wellness	○ Novel & Authentic ○ Bonding ○ Escape & Relax
PURPOSE DRIVEN FAMILIES	**1.4M**	No	○ Family-Focused Attractions ○ Cultural Experiences & Attractions ○ Festivals & Events	○ Novel & Authentic ○ Bonding ○ Traditions
CITY TRIPPERS	**4.0M**	No	○ Cuisine ○ Shopping ○ Festivals & Events	○ Escape & Relax ○ Bonding ○ Fun
SIMPLICITY LOVERS	**4.9M**	No	○ Cuisine ○ Nature Experiences ○ Health & Wellness	○ Escape & Relax ○ Simplicity ○ Security
FUN & SUN FAMILIES	**0.9M**	No	○ Family-Focused Attractions ○ Nature Experiences ○ Shopping	○ Escape & Relax ○ Bonding ○ Fun

KEY terminology on this page (for additional details and definitions see Glossary)

- **DESTINATION CANADA PRIORITY SEGMENT** – Traveller 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 maximize 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

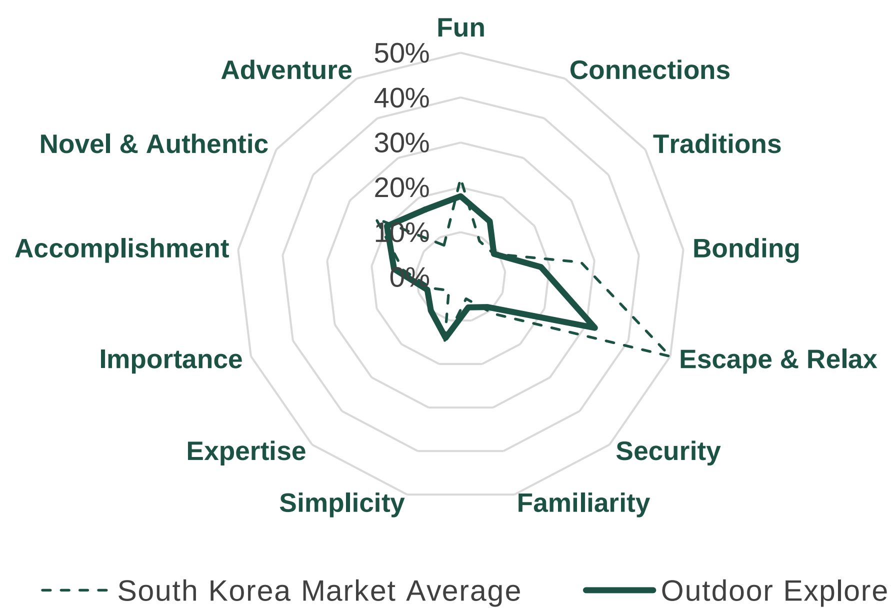
We are daring explorers who crave the thrill of unknown landscapes and overcoming challenges. Adventure travel allows us to grow, learn new skills, and establish personal traditions.

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

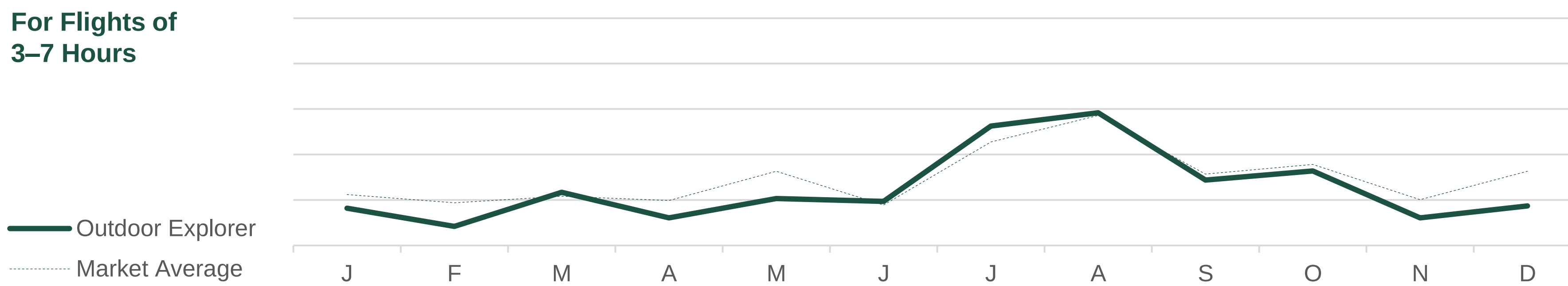
KEY terminology on this page

- **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

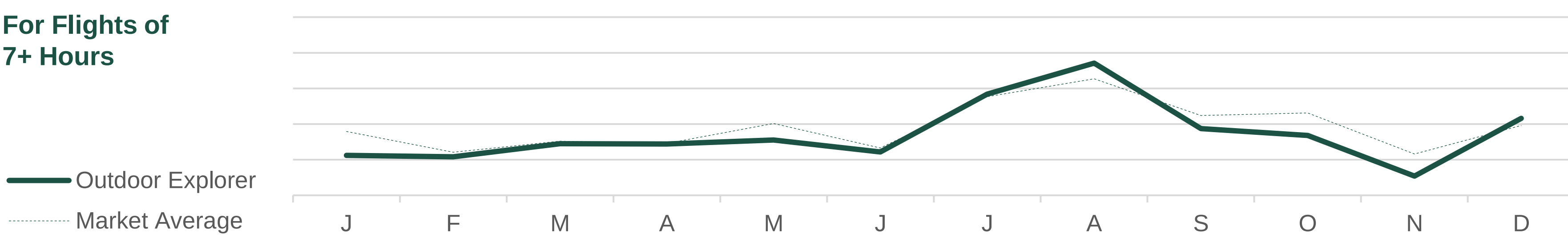
For additional definitions see Glossary

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	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	44%	100
○ See or explore mountains	17%	128
○ Camping	15%	134
○ Explore wilderness or backcountry	6%	134
Water-based sports	25%	152
○ Scuba diving or snorkeling	9%	130
○ Swimming	9%	145
Casual sports	22%	148
○ Golfing	10%	133
○ Fishing	6%	123
Winter-based sports	15%	147
○ Snowboarding or downhill skiing	9%	144
○ Ice skating or hockey	3%	133
High-intensity sports	12%	146
○ Bungee jumping or skydiving	5%	140
○ Rock climbing	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

	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**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	
	4 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 3.9 months** ○ Online videos
	3 MONTHS BEFORE MY TRIP	**Booked Transportation – 2.5 months** ○ Travel booking sites / apps **Booked Accommodation – 2.3 months** ○ Travel booking sites / apps
Started Researching and Planning – 1.9 months ○ Travel influencers **Booked Accommodation – 1.4 months** ○ Travel booking sites / apps **Booked Transportation – 1.4 months** ○ Travel booking sites / apps **Booked Activities – 1.2 months** ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 1.9 months** ○ Travel booking sites / apps
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

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: 7% — 105 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

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: 10% — 122 INDEX SCORE

SEGMENT ALIGNMENT: ●●●●●

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: 16% — 97 INDEX SCORE

SEGMENT ALIGNMENT: ●●●○○

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: 6% — 98 INDEX SCORE

SEGMENT ALIGNMENT: ●●○○○

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
South Korea	40%	92
Japan	16%	82
Vietnam	8%	108
US	5%	108
Philippines	4%	131

	SCORE	INDEX
China	4%	100
Germany	4%	145
UK	3%	144
Singapore	3%	112
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

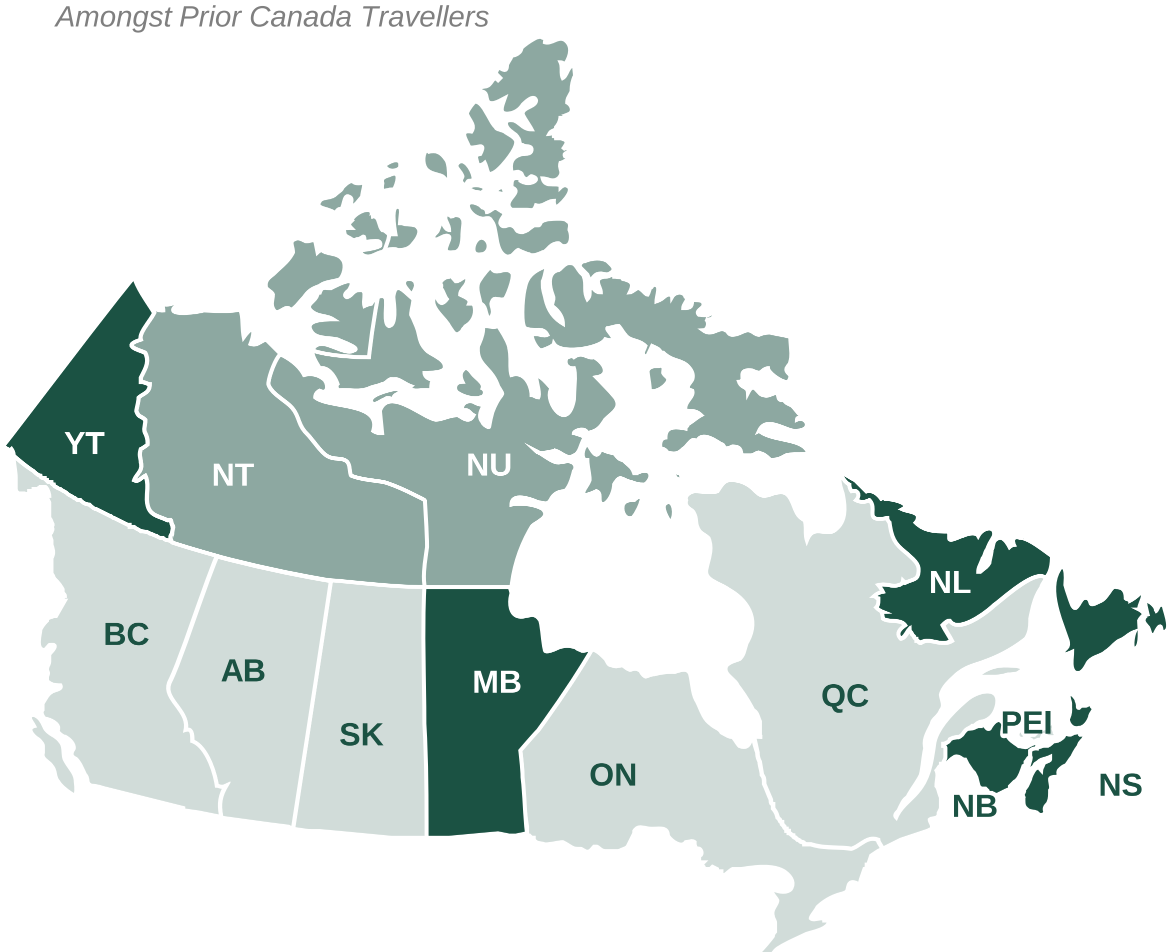
OVERALL INSIGHT

- 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.

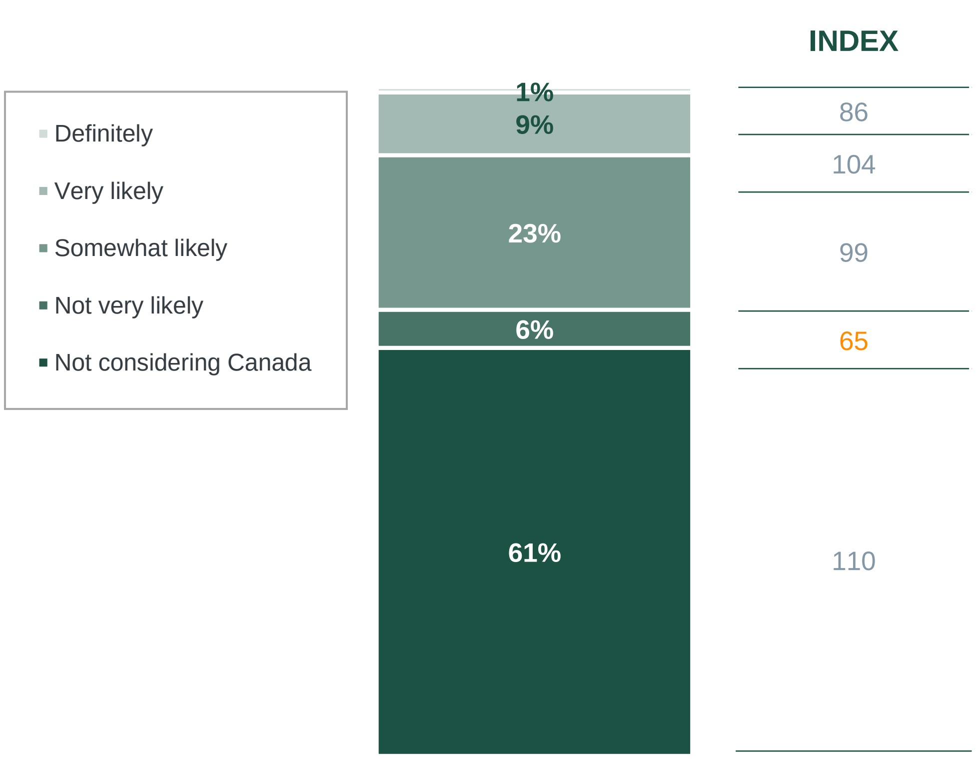
CANADA TRAVEL MONTHS ON A PAST TRIP

	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%

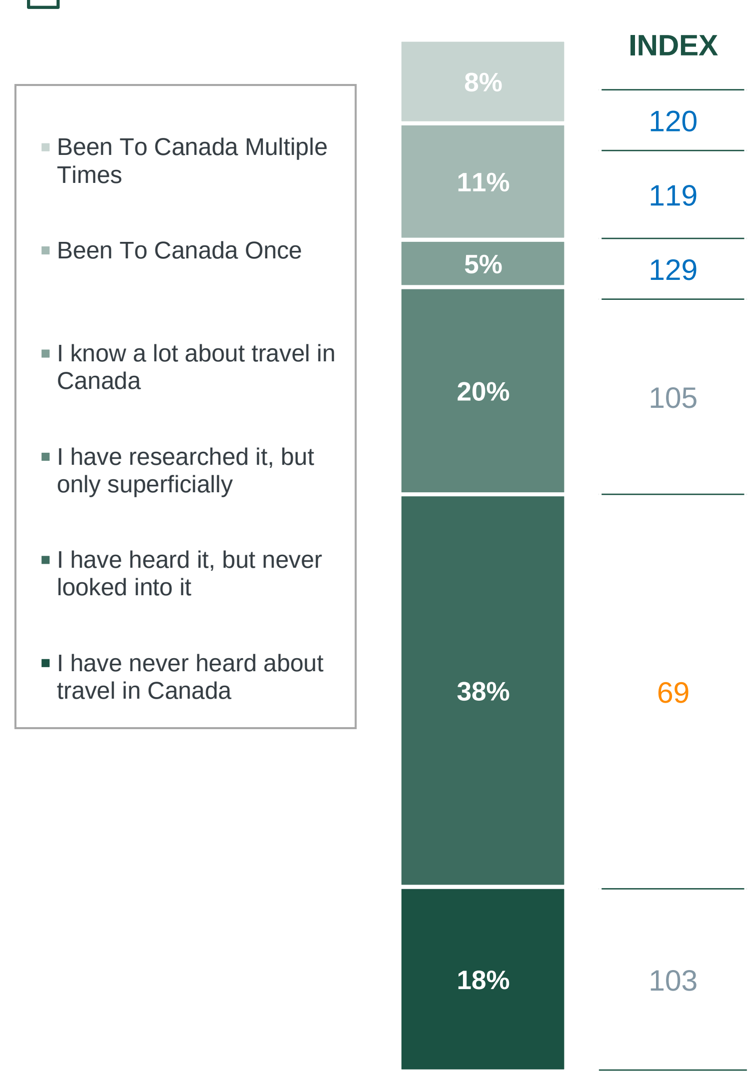
12% Been to Canada in last 5 years

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

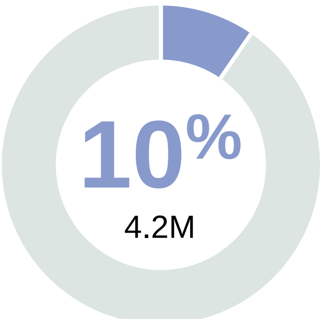
34%
Renovated house
78 INDEX SCORE

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

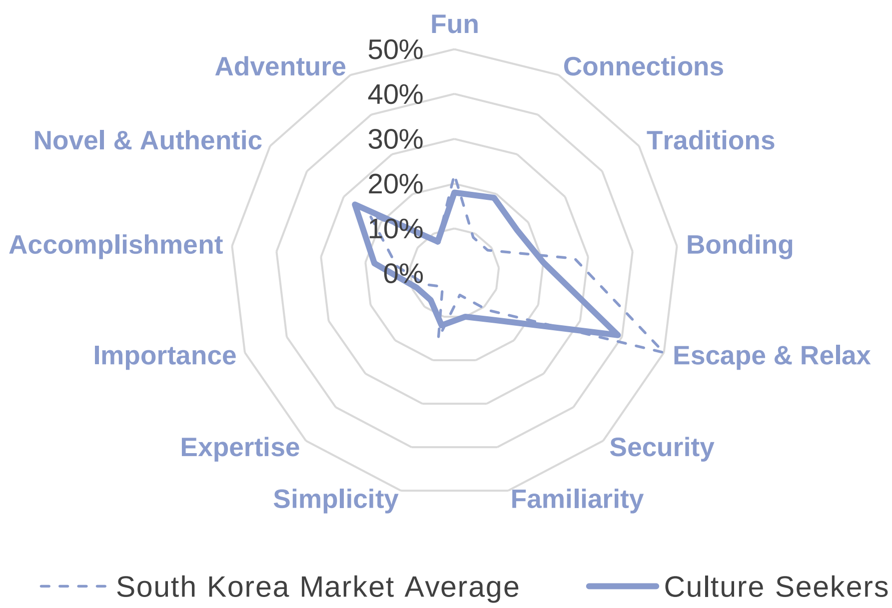
We are sociable, free-spirited individuals who seek unique, authentic experiences. We thrive on immersing ourselves in new perspectives, local culture, making connections, which boosts our energy and confidence.

We prefer vibrant city life, dynamic arts scenes, and culturally rich destinations. We prioritize diversity, 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, 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

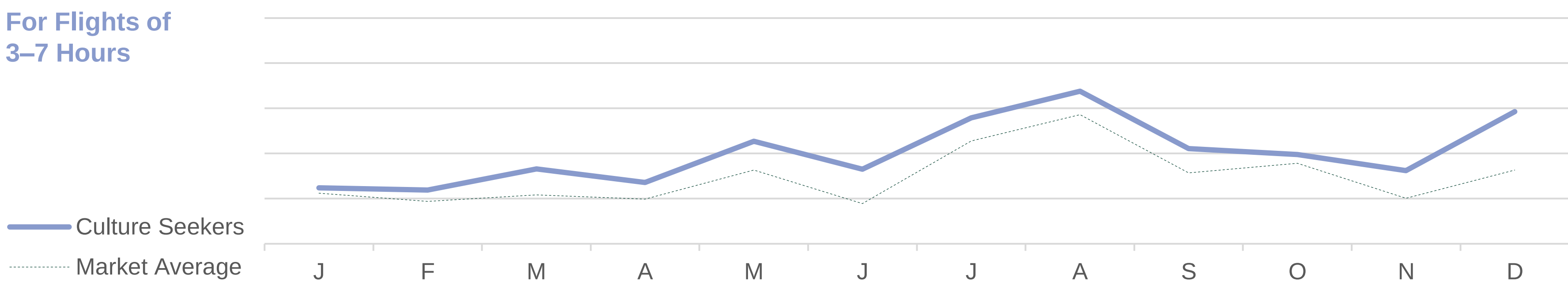
KEY terminology on this page

- **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

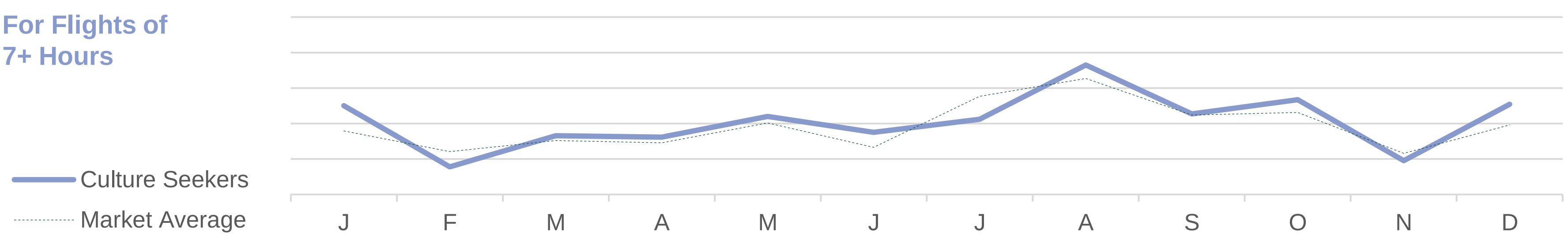
For additional definitions see Glossary

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	**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	**60%**	94
○ Street cuisine	**35%**	97
○ Cafes or bakeries	**24%**	91
○ Wineries	**11%**	116
Festivals and events	**44%**	126
○ Cultural or traditional festivals	**28%**	119
○ Music concerts or festivals	**20%**	114
Nightlife	**17%**	119
○ Bars and pubs	**10%**	109
○ Clubs and dancing	**9%**	141
Winter-based sports	**8%**	109
○ Dog-sledding	**3%**	144
○ Ice skating or hockey	**2%**	118
Cultural experiences or attractions	**56%**	98
○ Historical or archeological sites	**28%**	92
○ History or culture lessons	**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

	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**	TIMELINE	FLIGHT OF **7+ HOURS**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	
	4 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 3.6 Months** ○ Travel booking sites / apps
Started Researching and Planning – 2.4 months ○ Online videos	**3 MONTHS** BEFORE MY TRIP	
Booked Transportation – 1.6 months ○ Travel booking sites / apps **Booked Accommodation – 1.6 months** ○ Travel booking sites / apps **Booked Activities – 1.5 months** ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	**Booked Transportation – 2.2 months** ○ Direct with company **Booked Accommodation – 1.7 months** ○ Travel booking sites / apps **Booked Activities – 1.6 months** ○ Travel booking sites / apps
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

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

21% 114 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

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

7% 103 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ● ●

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

% OF TOTAL TRIPS

15% 95 INDEX SCORE

SEGMENT ALIGNMENT ● ● ● ○ ○

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

11% 117 INDEX SCORE

SEGMENT ALIGNMENT ● ● ○ ○ ○

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
South Korea	**31%**	74
Japan	**21%**	117
Vietnam	**7%**	86
China	**5%**	120
US	**5%**	108

	SCORE	INDEX
Philippines	**4%**	128
Australia	**4%**	136
Switzerland	**3%**	136
France	**2%**	127
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

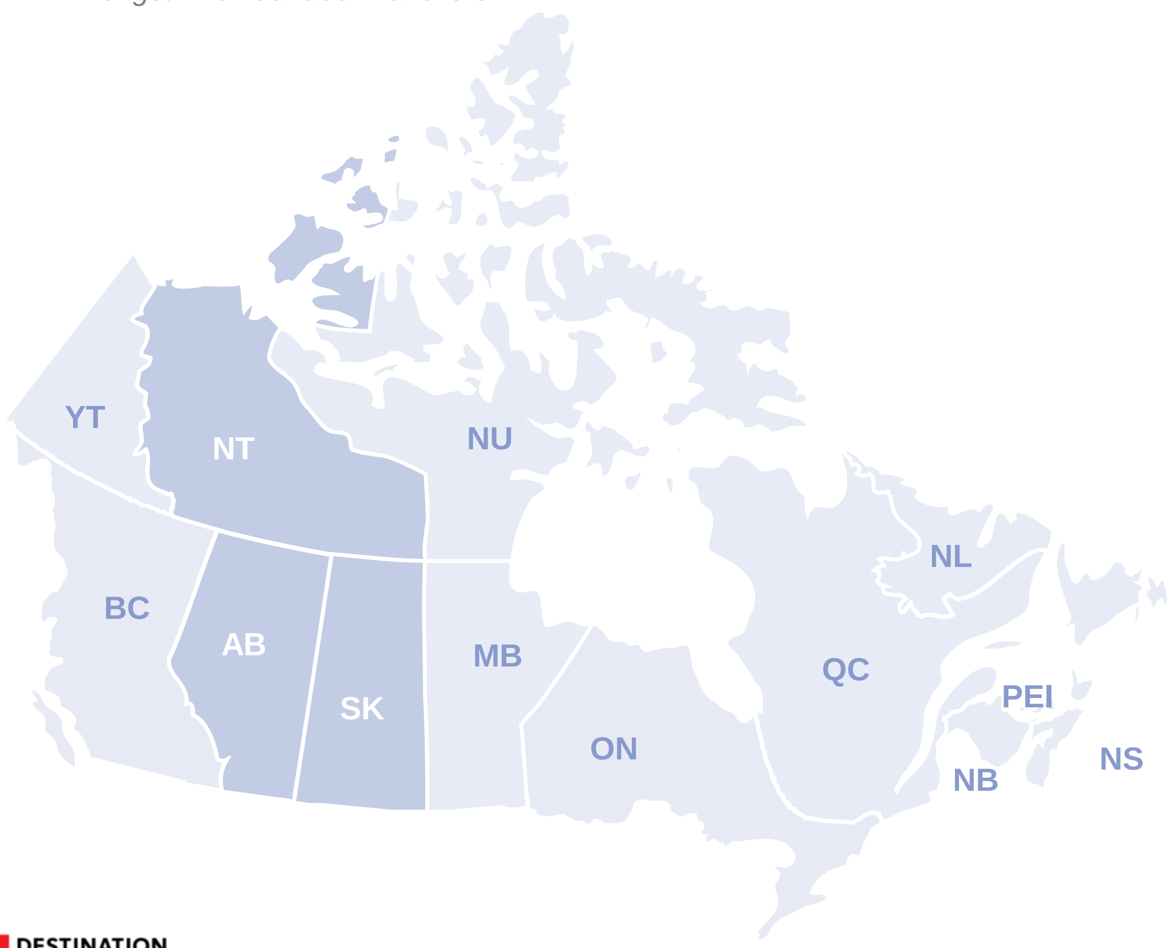
OVERALL INSIGHT

- 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.

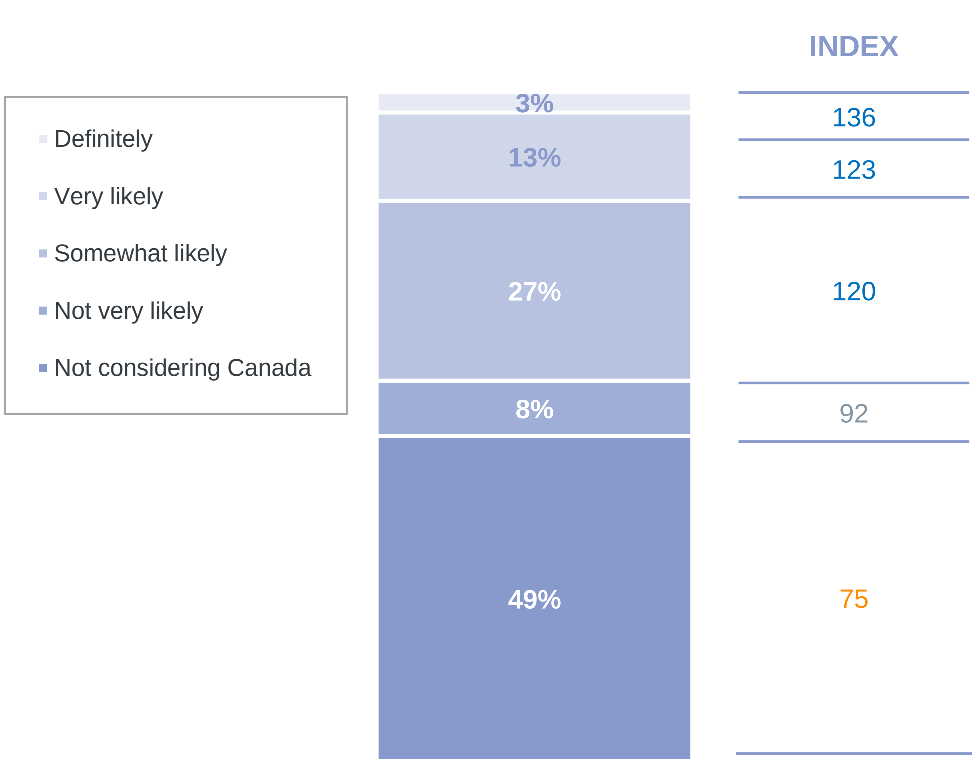
CANADA TRAVEL MONTHS ON A PAST TRIP

	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%

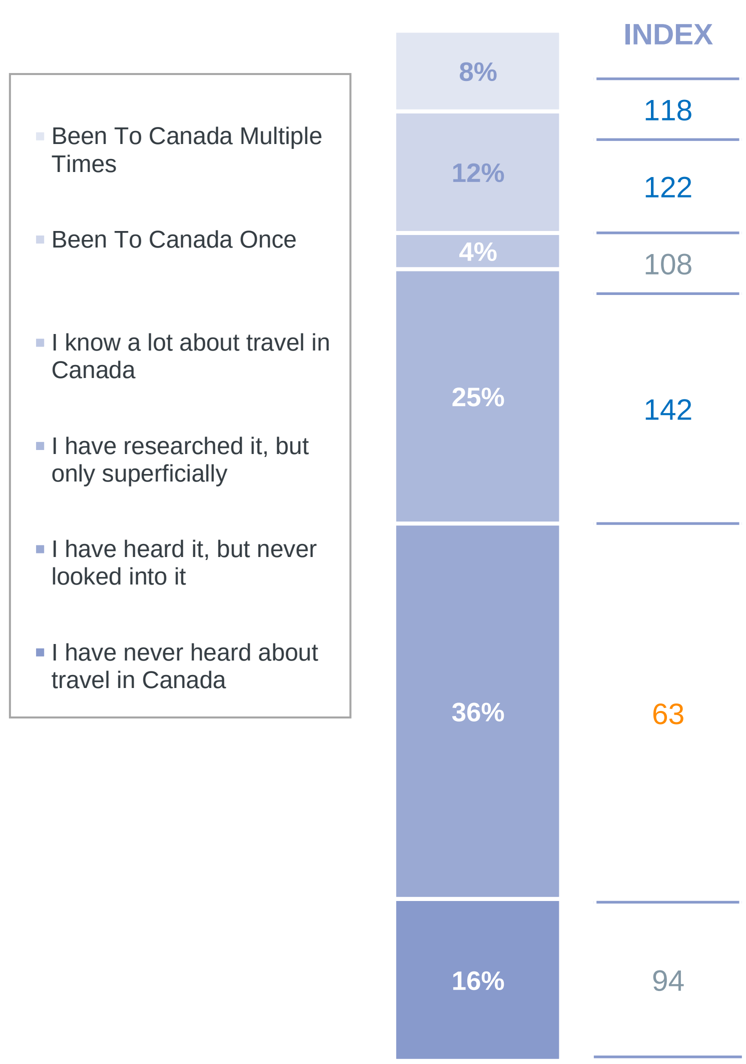
13% Been to Canada in last 5 years

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 in 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

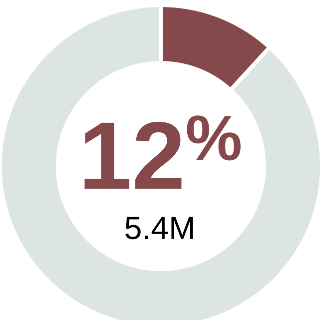
45%
Renovated house
126 INDEX SCORE

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

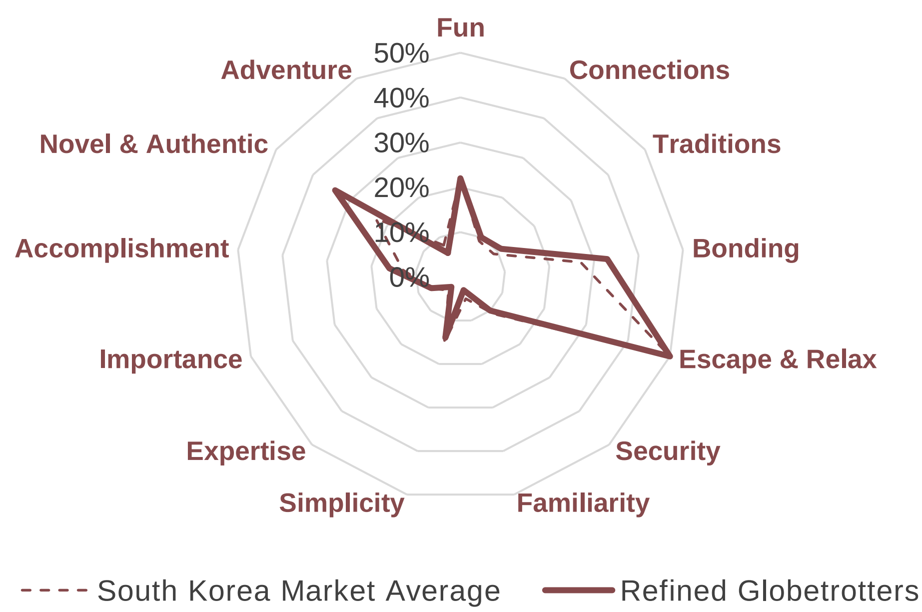
We prioritize travel above all, indulging in world-class destinations, gourmet dining, and exclusive experiences. We are experienced travellers who are always on the lookout for new, unique places to cross off our list.

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

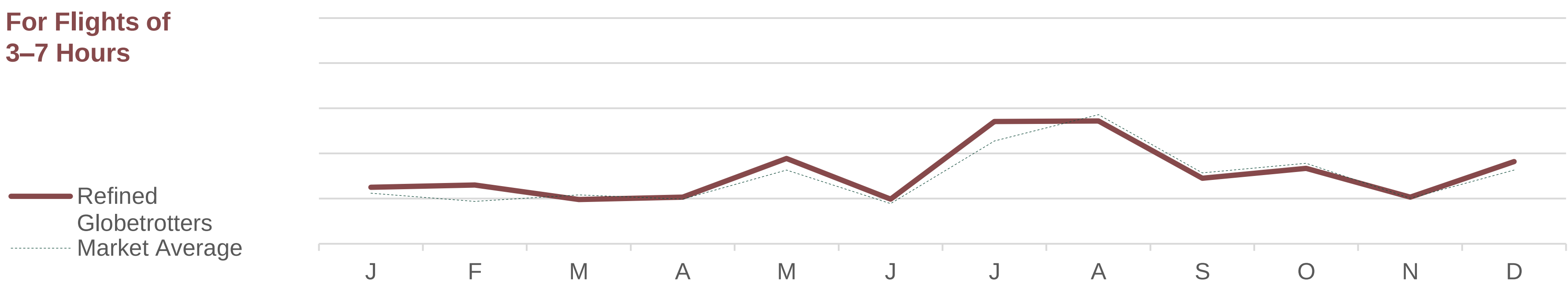
KEY terminology on this page

- **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

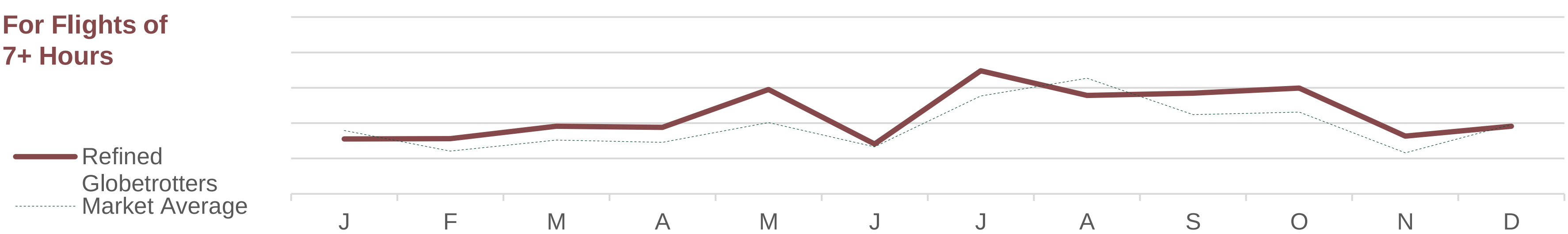
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



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	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
Local cuisine	**74%**	115
○ Local restaurants	**62%**	112
○ Street cuisine	**42%**	113
○ Luxury dining	**31%**	140
Cultural experiences or attractions	**68%**	126
○ Historical or archeological sites	**48%**	140
○ Museums	**42%**	129
Health and wellness	**48%**	132
○ Spas	**33%**	133
○ Outdoor hot tub or bath	**30%**	132
Guided tours	**37%**	150
○ City tours	**23%**	144
○ Wildlife or nature tours	**22%**	142
Overnight experiences	**19%**	122
○ Staying at all-inclusive resort	**12%**	143
○ Cruise	**8%**	134
Nature experiences	**52%**	123
Shopping	**39%**	105
Family-focused attractions	**33%**	100
Festivals and events	**28%**	86
Casual sports	**9%**	88
Nightlife	**8%**	88
Water-based sports	**6%**	85

DESTINATION CANADA

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

	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.

Timeline

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

FLIGHT OF 3–7 HOURS

Started Researching and Planning – 2.5 months
- Recommendations from friends or family

Booked Transportation – 1.6 months
- Travel booking sites / apps

Booked Accommodation – 1.5 months
- Travel booking sites / apps

Booked Activities – 1.3 months
- Travel booking sites / apps

FLIGHT OF 7+ HOURS

Started Researching and Planning – 4.2 Months
- Travel agents / advisors
- Online videos

Booked Transportation – 2.9 months
- Direct with company

Booked Accommodation – 2.5 months
- Travel booking sites / apps

Booked Activities – 2 months
- Travel booking sites / apps

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: 14% — 135 INDEX SCORE

SEGMENT ALIGNMENT: 5 of 5

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

% OF TOTAL TRIPS: 9% — 109 INDEX SCORE

SEGMENT ALIGNMENT: 5 of 5

TRIP TYPE	Historical Site		
COMPANIONS	Couple only	41%	
TRIP EMOTIONAL MOTIVATIONS	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: 7% — 102 INDEX SCORE

SEGMENT ALIGNMENT: 3 of 5

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: 17% — 154 INDEX SCORE

SEGMENT ALIGNMENT: 2 of 5

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%	
	Visiting famous shopping centres	34%	
KEY BEHAVIOURS	All about fun, and needs to be easy to get to. Shopping and dining on a budget		

REFINED GLOBETROTTERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We enjoy exploring well-known and luxury destinations, with access to nature, through curated experiences.
- Though we travel domestically, we often travel internationally and long-haul.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
South Korea	36%	83
Japan	20%	108
Vietnam	9%	129
Thailand	5%	131
US	5%	127

	SCORE	INDEX
China	5%	116
Singapore	3%	112
Australia	3%	113
Philippines	3%	98
Italy	3%	123

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Known for stunning natural landscapes	59%	134
Has a rich cultural and historical heritage	48%	139
Has famous attractions	47%	128
Has a variety of museums and / or historical sites	37%	139
Renowned for food and drink experiences	36%	125
Provide access to unique natural wonders	35%	128
Has luxury dining, shopping, and accommodations	29%	145
Has packaged holiday / vacation offers	15%	142

REFINED GLOBETROTTERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

OVERALL INSIGHT

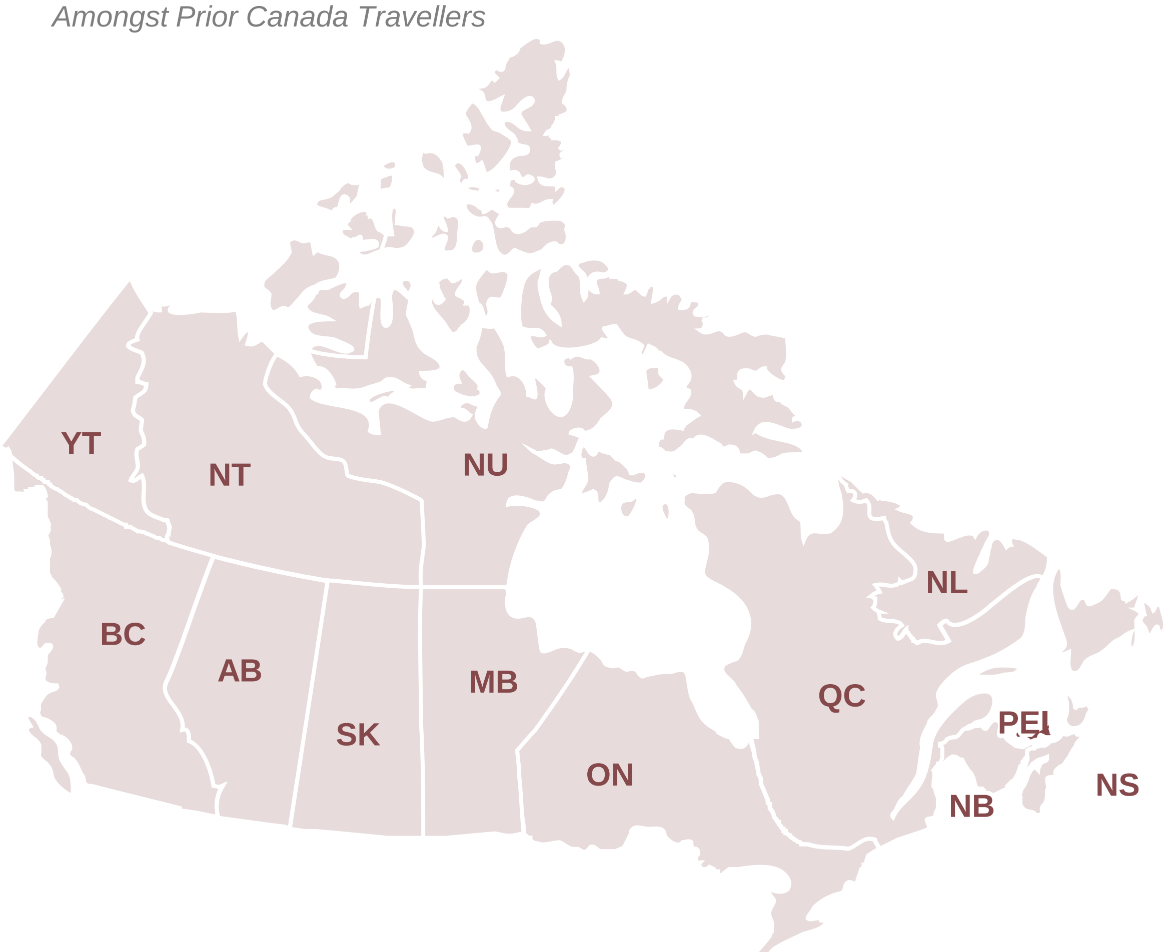
- We are more likely than others to have been to Canada before, but perhaps not recently.
- We are most likely to have visited Ontario and Quebec and over index with Prince Edwards Island.
- Future trips to Canada could still include a variety of provinces and destinations.

WHERE DO WE WANT TO GO IN CANADA

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

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

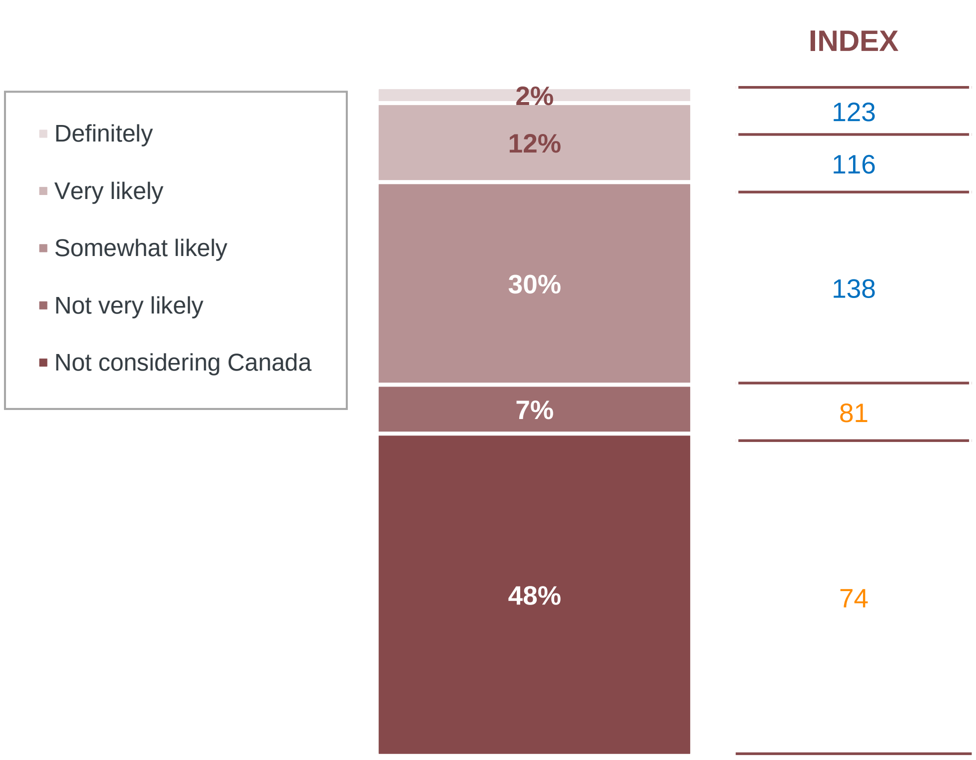
	WINTER (Dec-Feb)	SPRING (Mar-May)	SUMMER (Jun-Aug)	AUTUMN (Sept-Nov)
REFINED GLOBETROTTERS	**15%**	**25%**	**33%**	**39%**
VS. TOTAL MARKET	23%	30%	28%	30%

12%

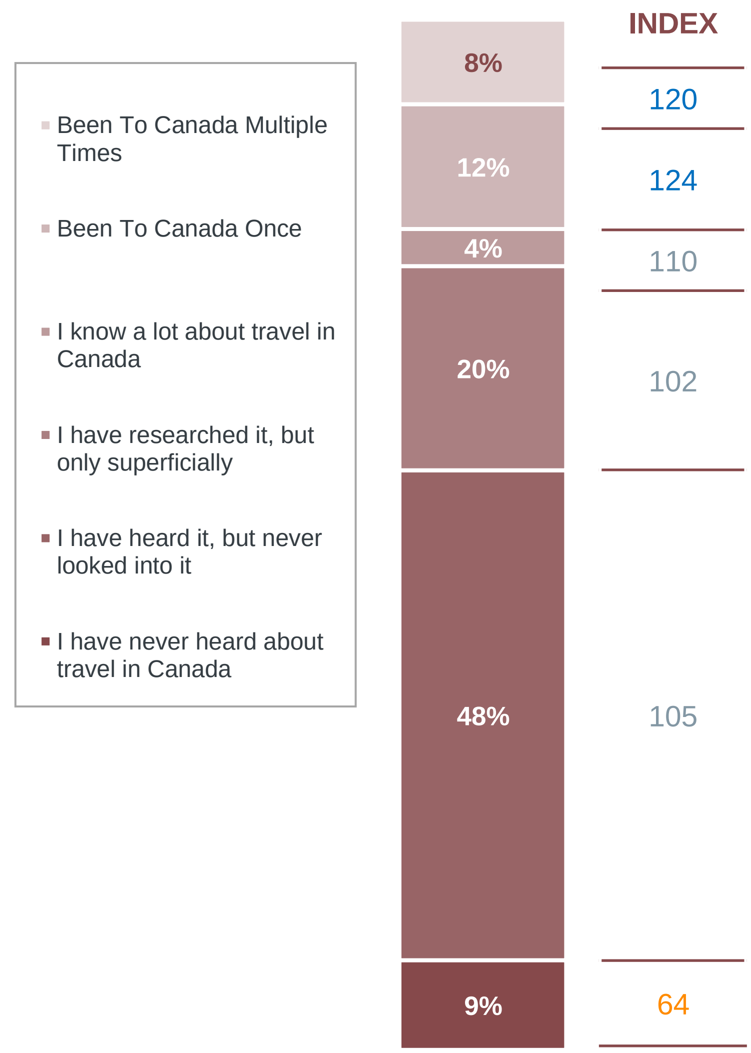
Been to Canada in last 5 years

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

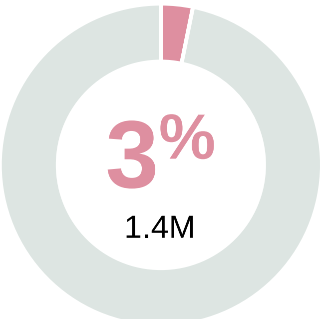
41%
Renovated house
110 INDEX SCORE

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

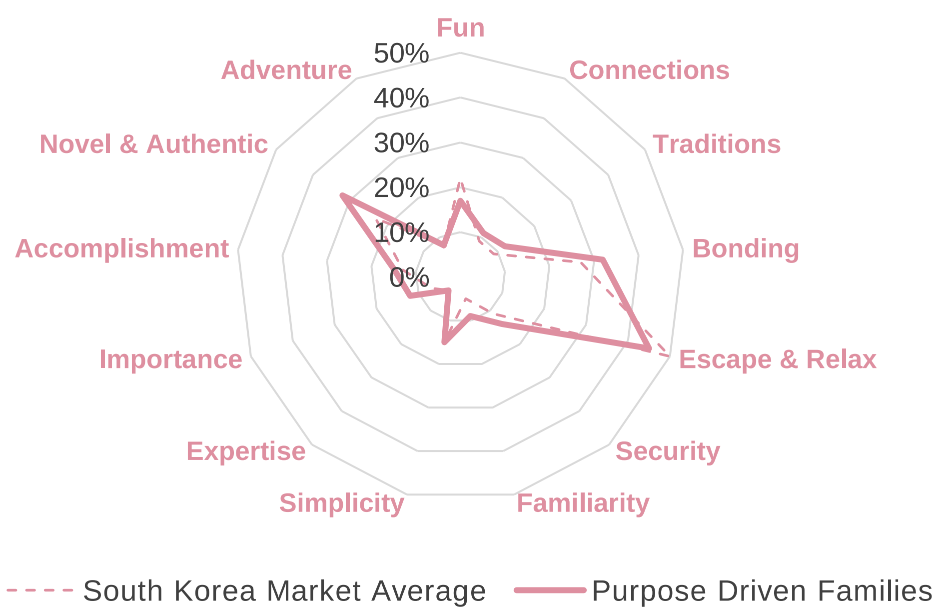
We are ambitious and conscientious parents who prioritize unique, kid-friendly travels. We relish hidden gems that support local cultures, and anywhere that lets us spend time in nature.

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.

73%

103 Have a valid passport

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

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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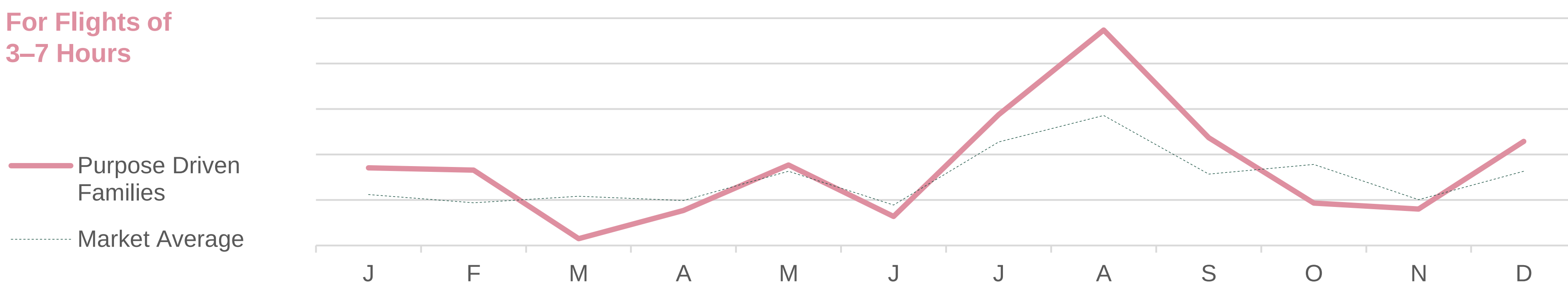
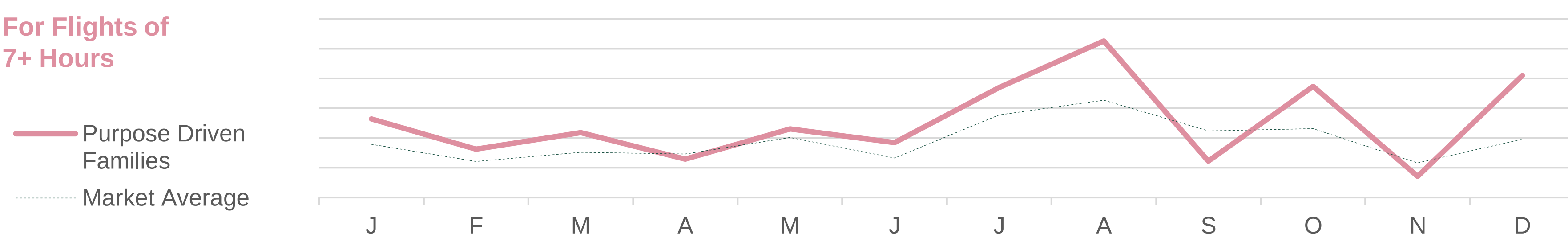
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

		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
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	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
Family-focused attractions	70%	139
○ Amusement parks or theme parks	54%	140
○ Zoos or aquariums	47%	134
○ Space or science centres	24%	147
Cultural experiences or attractions	70%	132
○ Museums	46%	139
○ Historical or archeological sites	41%	124
Winter-based sports	10%	119
○ Snowboarding or downhill skiing	8%	135
○ Ice skating or hockey	3%	131
Local cuisine	58%	91
○ Local restaurants	53%	97
○ Cafes or bakeries	29%	103
Nature experiences	47%	109
○ Oceanside beaches	31%	109
○ Visit city parks or gardens	20%	123
Festivals and events	39%	113
Shopping	34%	95
Health and wellness	31%	66
Guided tours	24%	99
Casual sports	12%	104
Overnight experiences	13%	95
Water-based sports	10%	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

	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
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	
	4 MONTHS BEFORE 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.
Started Researching and Planning – 2.6 months - Recommendations from friends or family **Booked Transportation – 2 months** - Travel booking sites / apps	**3 MONTHS** BEFORE MY TRIP	
Booked Accommodation – 1.7 months - Travel booking sites / apps **Booked Activities – 1.4 months** - Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

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		**63%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		**48%**
	Zoos or aquariums		**30%**
	Museums		**25%**
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		**44%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Security
ACTIVITIES	Amusement parks or theme parks		**28%**
	Street cuisine		**21%**
	Oceanside beaches		**17%**
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		**19%**
	Urban centre		**18%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Bonding
ACTIVITIES	Local restaurants		**59%**
	Cafes or bakeries		**20%**
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		**15%**
	Cultural experience		**14%**
TRIP EMOTIONAL MOTIVATIONS	Escape & Relax	Fun	Simplicity
ACTIVITIES	Local restaurants		**58%**
	Historical or archeological sites		**24%**
	Visiting local monuments		**23%**
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
South Korea	**48%**	107
Japan	**19%**	100
Vietnam	**9%**	120
Singapore	**4%**	149
US	**4%**	95

	SCORE	INDEX
China	**3%**	91
France	**2%**	121
Philippines	**2%**	88
New Zealand	**2%**	140
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

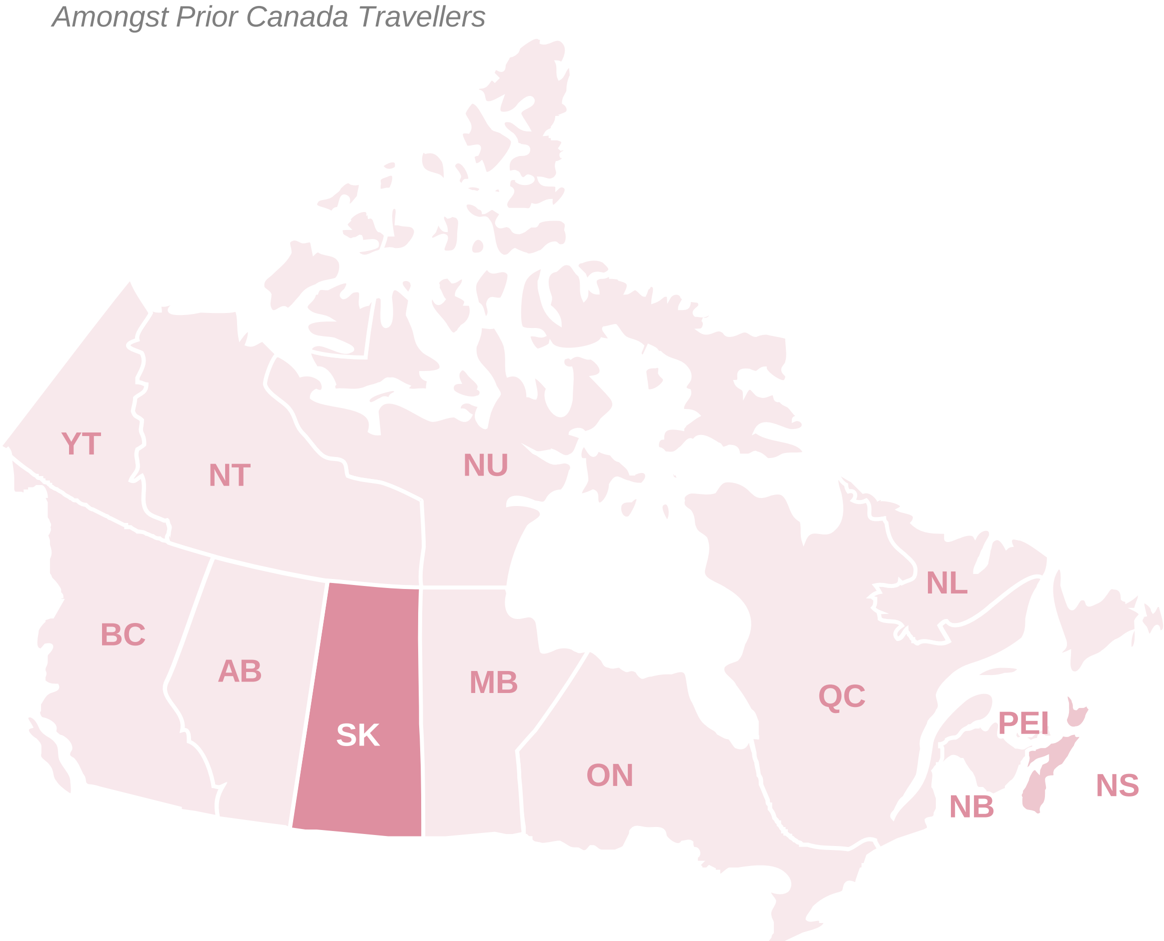
MONTREAL NIAGARA FALLS

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.

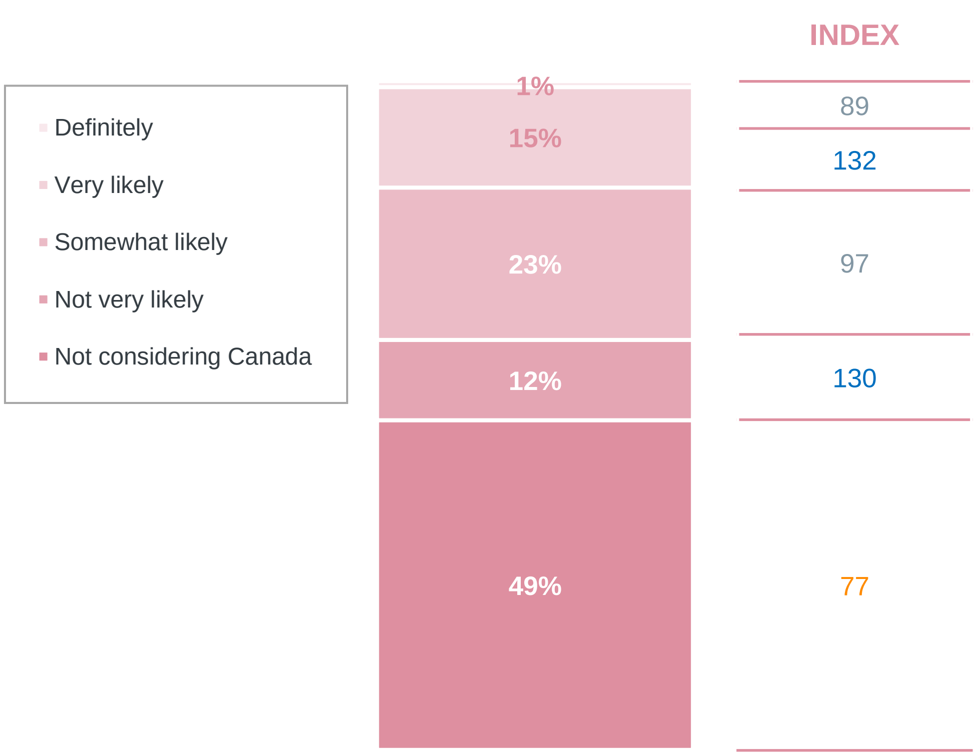
CANADA TRAVEL MONTHS ON A PAST TRIP

	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%

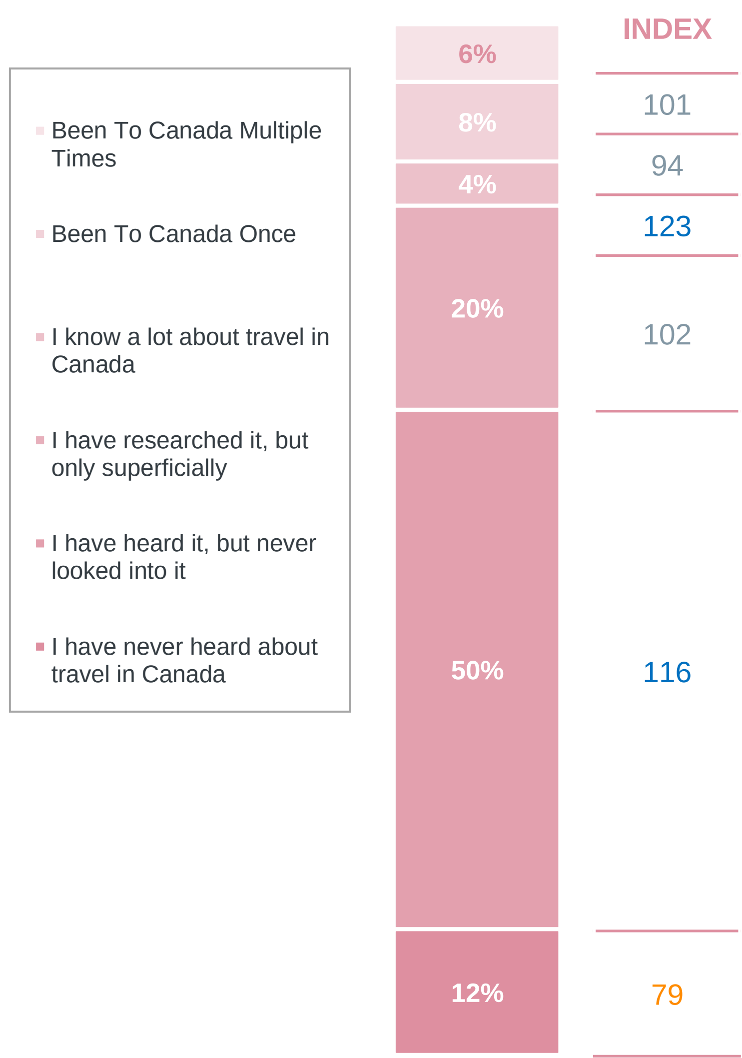
8% Been to Canada in last 5 years

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

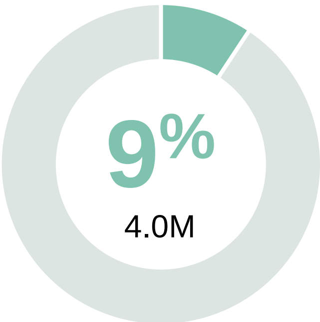
48%
Renovated house
142 INDEX SCORE

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



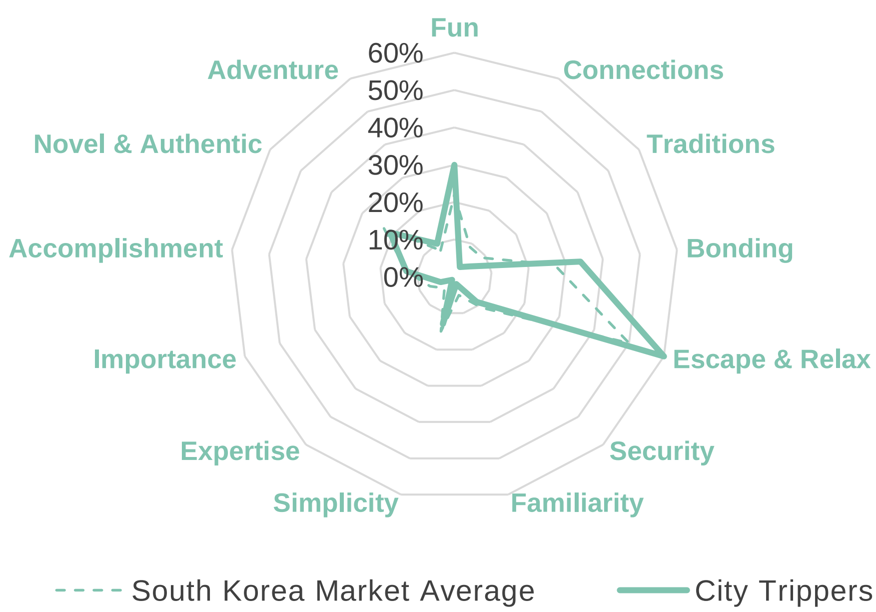
% OF SOUTH KOREA POPULATION

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.

68%
92 Have a valid passport

GENDER

44%	61	Male
56%	139	Female
0%		Non-binary / Other

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

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

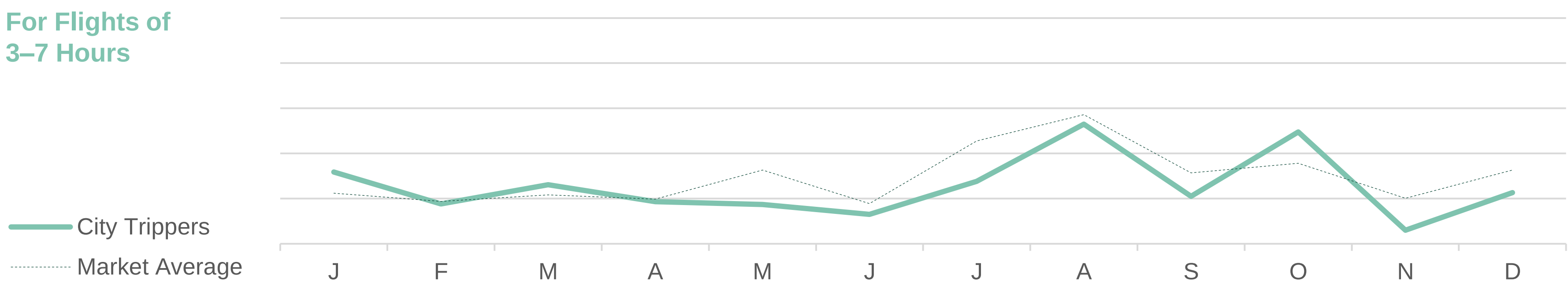
KEY terminology on this page

- **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

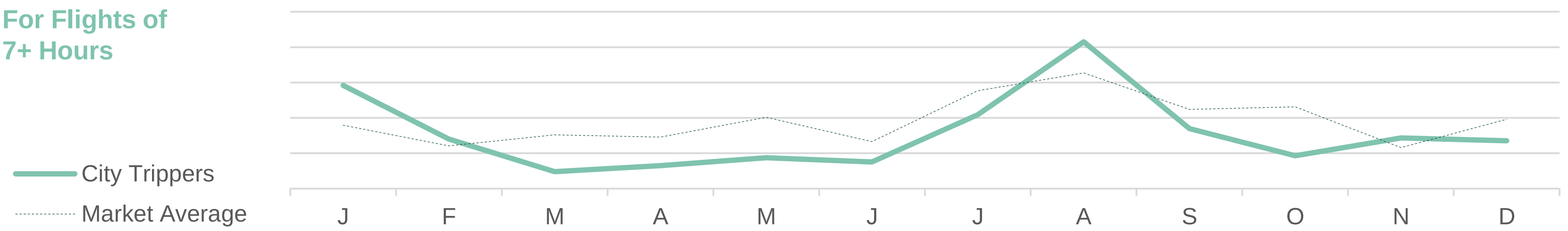
For additional definitions see Glossary

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

	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
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	
	4 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 3.3 months** ○ Online videos
Started Researching and Planning – 2.7 months ○ Travel review sites	**3 MONTHS** BEFORE MY TRIP	
	2 MONTHS BEFORE MY TRIP	**Booked Transportation – 2.5 months** ○ Travel booking sites / apps **Booked Accommodation – 2.2 months** ○ Travel booking sites / apps **Booked Activities – 2 months** ○ Travel booking sites / apps
Booked Transportation – 1.7 months ○ Travel booking sites / apps **Booked Accommodation – 1.7 months** ○ Travel booking sites / apps **Booked Activities – 1.2 months** ○ Travel booking sites / apps	**1 MONTH** BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

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
ACTIVITIES	Local restaurants	59%	
	Souvenir shopping	25%	
	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
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		

% 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
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		

% OF TOTAL TRIPS 6% — 97 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		

CITY TRIPPERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- We seek trendy locations with ease of travel, where famous attractions, culinary experiences, and social settings are abundant.
- Most of our trips are a few days long to domestic destinations. We take international trips every few years.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
South Korea	**51%**	115
Japan	**21%**	114
Vietnam	**8%**	104
US	**4%**	97
Thailand	**4%**	111

	SCORE	INDEX
Philippines	**3%**	95
China	**2%**	69
France	**2%**	93
UK	**2%**	103
Spain	**2%**	95

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	**67%**	128
Has famous attractions	**51%**	135
Is easy to travel to	**51%**	123
Has well-developed tourism infrastructure	**49%**	131
Renowned for food and drink experiences	**38%**	129
Is easy to travel around once there	**37%**	120
Provides a variety of local festivals and events	**26%**	124
Is a trendy destination	**20%**	144

CITY TRIPPERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

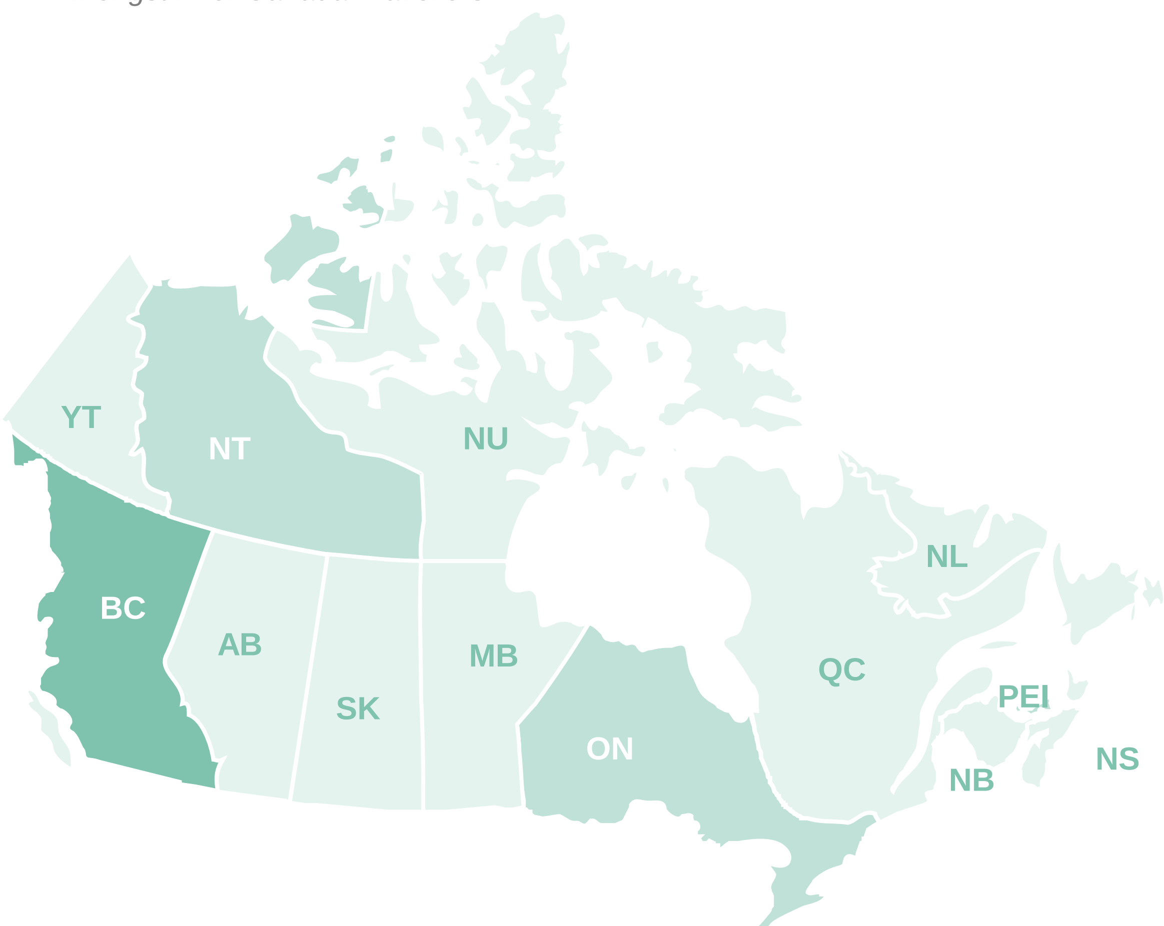
OVERALL INSIGHT

- 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.

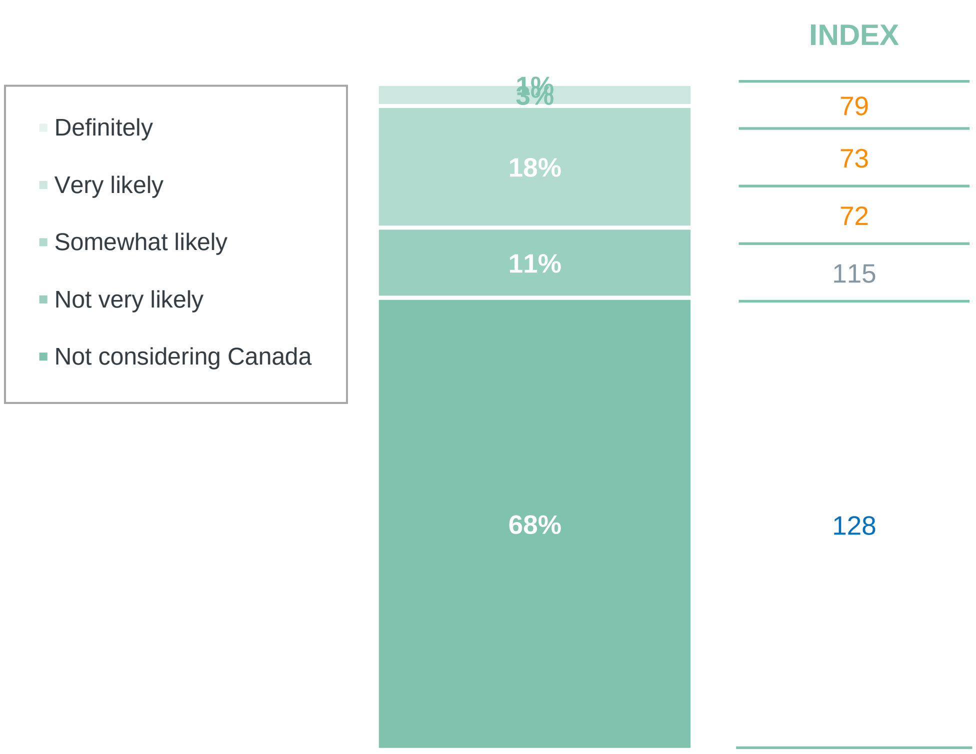
CANADA TRAVEL MONTHS ON A PAST TRIP

	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%

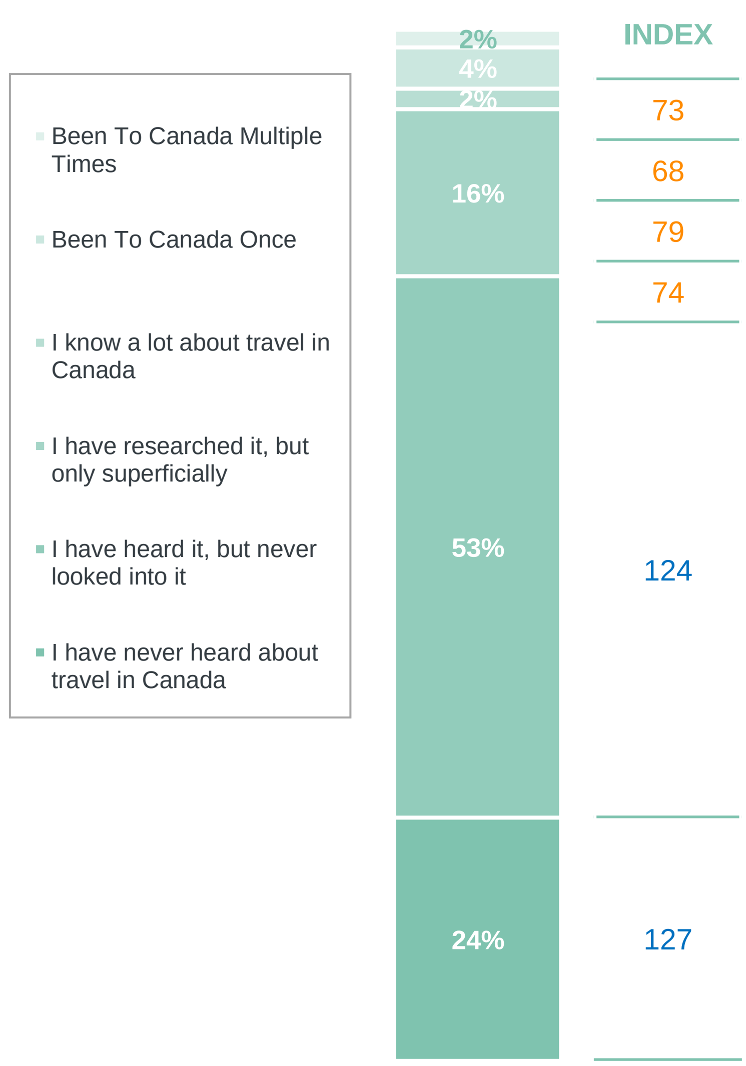
3% Been to Canada in last 5 years

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

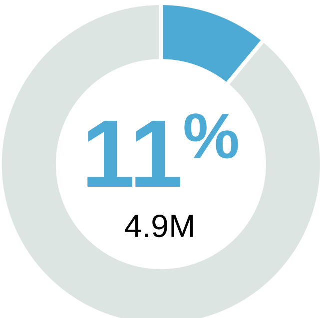
39%
Renovated house
99 INDEX SCORE

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



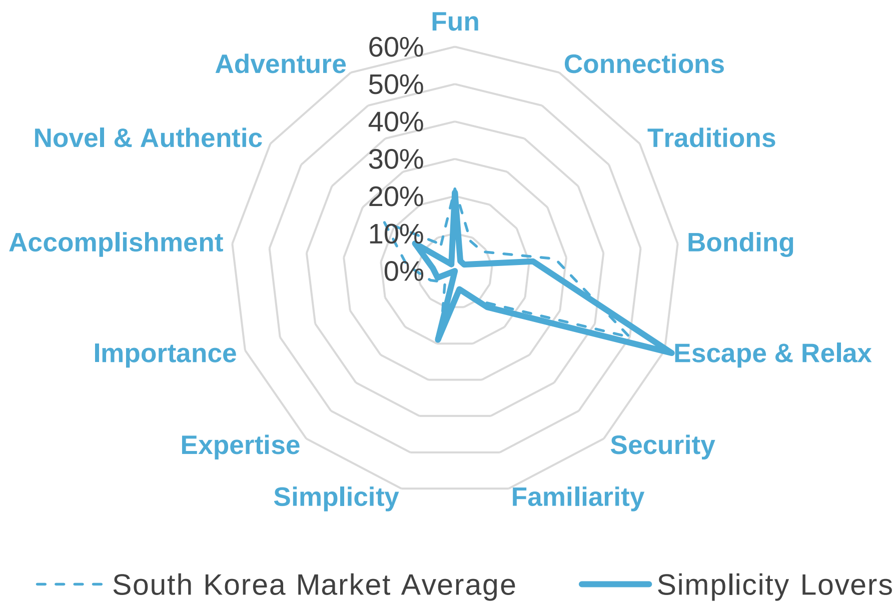
% OF SOUTH KOREA POPULATION

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.

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*

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

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

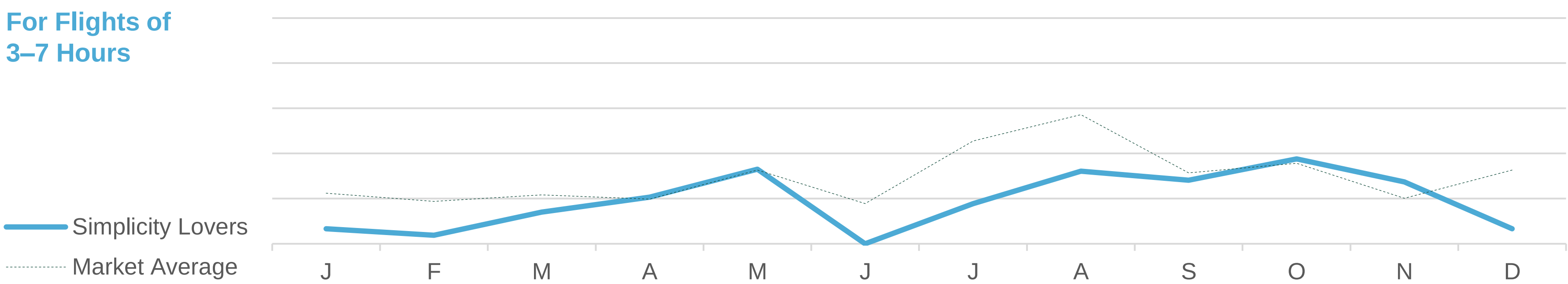
KEY terminology on this page

- **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

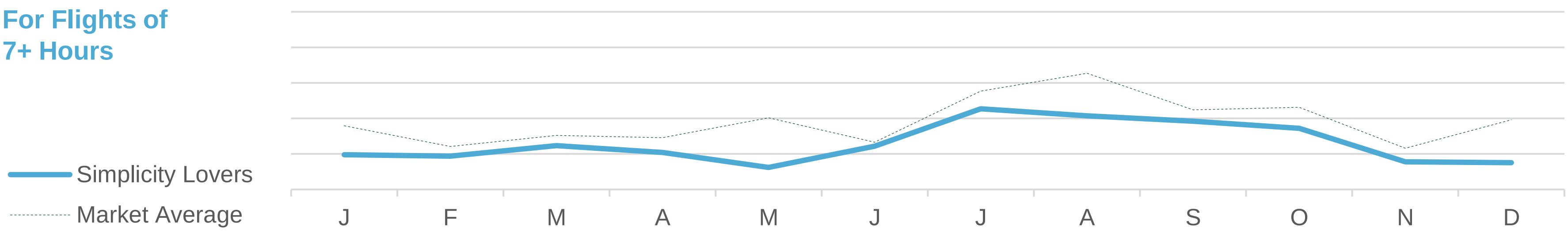
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



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	**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	73%	114
○ Local restaurants	66%	118
○ Street cuisine	39%	106
○ Cafes or bakeries	26%	96
Nature experiences	49%	115
○ Oceanside beaches	34%	120
○ Fall colours	20%	126
Health and wellness	42%	109
○ Outdoor hot tub or bath	25%	109
○ Spas	25%	97
Casual sports	11%	100
○ Golfing	7%	104
○ Casual biking	4%	112
Cultural experiences or attractions	50%	85
○ Museums	26%	86
○ Historical or archeological sites	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

	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**
	7 MONTHS + BEFORE MY TRIP	
	6 MONTHS BEFORE MY TRIP	
	5 MONTHS BEFORE MY TRIP	**Started Researching and Planning – 4.7 Months** ○ Blogs
	4 MONTHS BEFORE MY TRIP	**Booked Transportation – 3.6 months** ○ Direct with company **Booked Accommodation – 3.4 months** ○ Travel booking sites / apps
Started Researching and Planning – 1.9 months ○ Recommendations from friends or family	**3 MONTHS** BEFORE MY TRIP	
Booked Transportation – 1.7 months ○ Travel booking sites / apps **Booked Accommodation – 1.6 months** ○ Travel booking sites / apps **Booked Activities – 1.4 months** ○ Travel booking sites / apps	**2 MONTHS** BEFORE MY TRIP	**Booked Activities – 2.3 months** ○ Travel booking sites / apps
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

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

34% 133 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

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

% OF TOTAL TRIPS

11% 116 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% 121 INDEX SCORE

SEGMENT ALIGNMENT

● ● ● ● ●

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		

% OF TOTAL TRIPS

23% 167 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		

SIMPLICITY LOVERS

OUR BEHAVIOURS – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are affordable, accessible, not-too crowded, and have pleasant weather.
- We take shorter trips, mostly domestic, and often don't travel for more than a couple days.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
South Korea	57%	127
Japan	16%	85
Vietnam	6%	65
China	4%	102
Thailand	3%	100

	SCORE	INDEX
US	3%	60
Singapore	2%	95
Hong Kong	2%	118
Philippines	2%	72
France	2%	66

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	68%	129
Is easy to travel to	58%	134
Has a mild and pleasant climate	57%	138
Isn’t too crowded	55%	149
Known for stunning natural landscapes	51%	117
Is easy to travel around once there	42%	129
Doesn’t take too long to get there	41%	135
Language is not a barrier	22%	127

SIMPLICITY LOVERS

OUR BEHAVIOURS – THOUGHTS ON CANADA

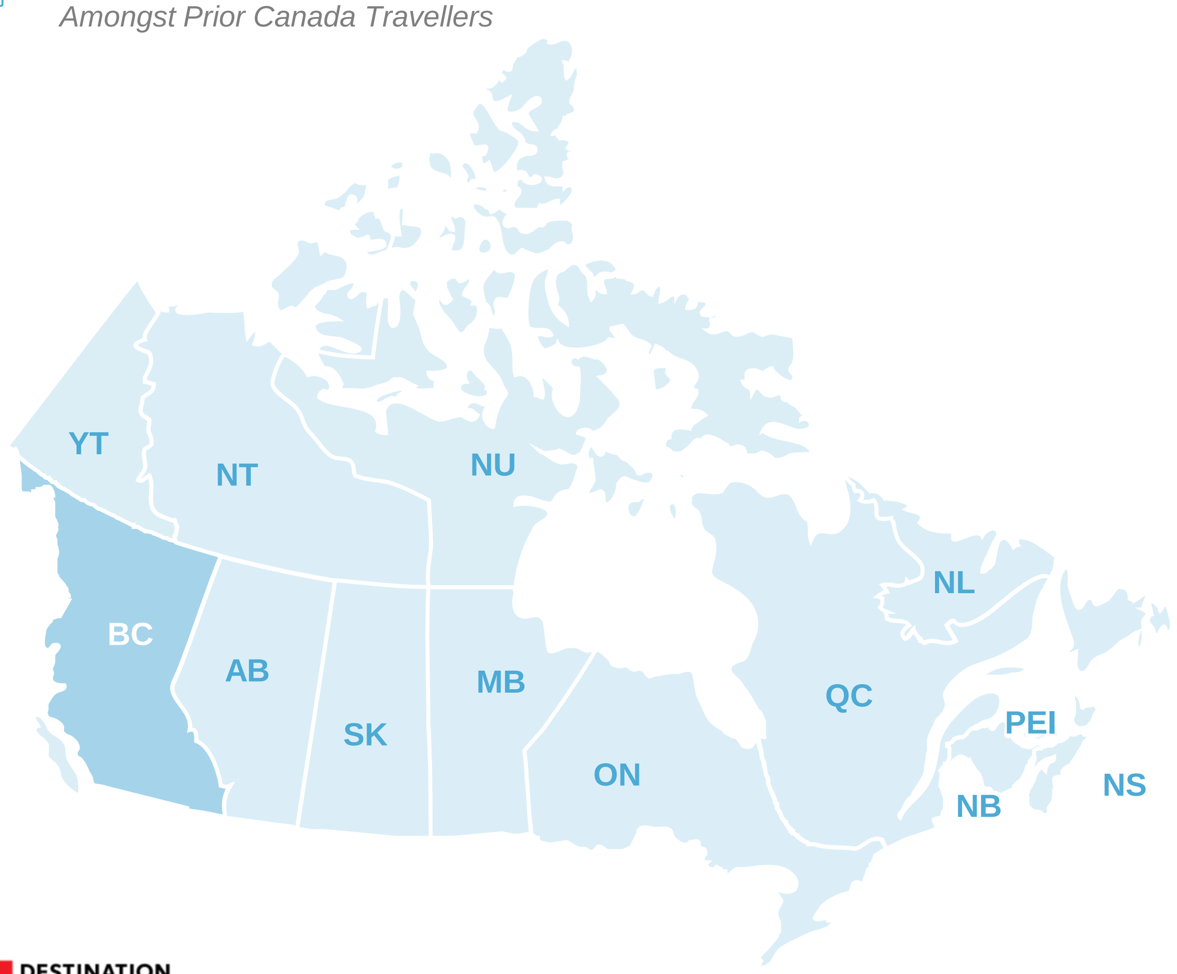
OVERALL INSIGHT

- 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.

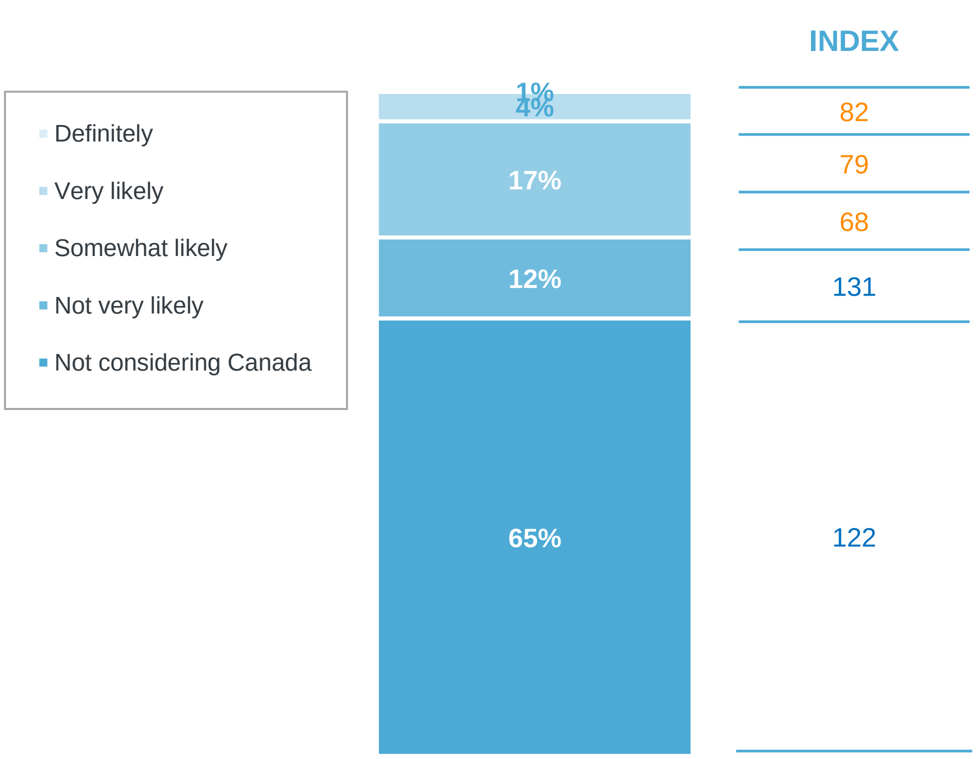
CANADA TRAVEL MONTHS ON A PAST TRIP

	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%

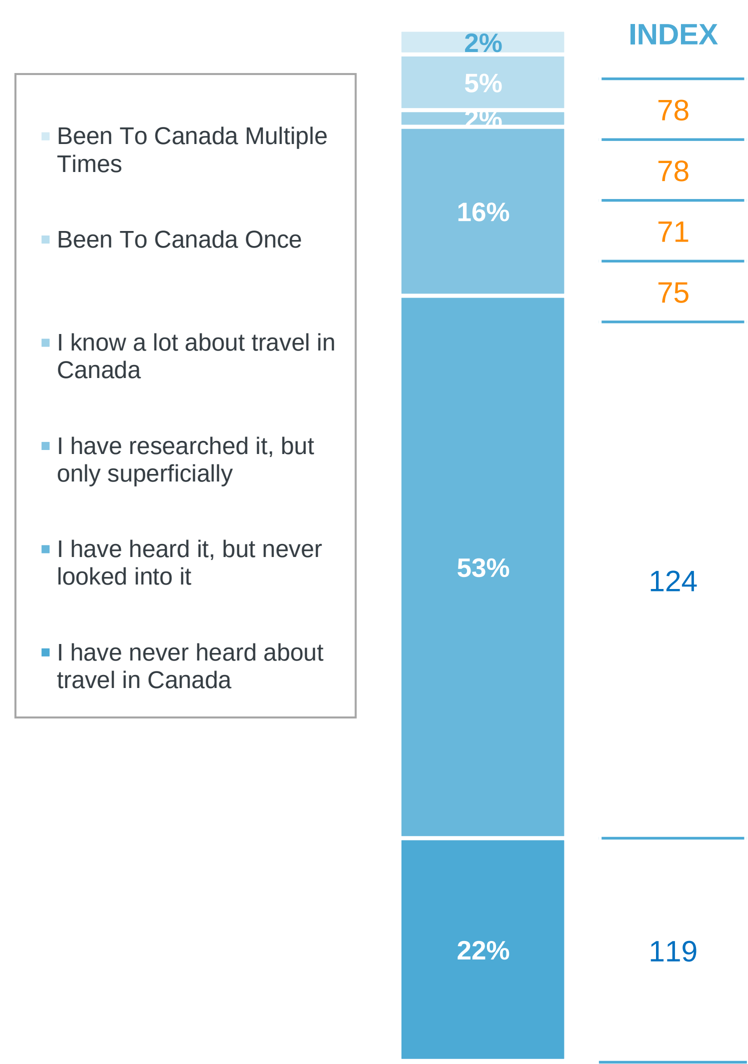
3% Been to Canada in last 5 years

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

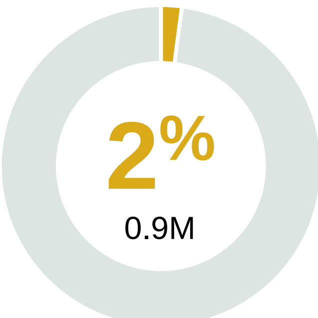
33%
Renovated house
71 INDEX SCORE

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

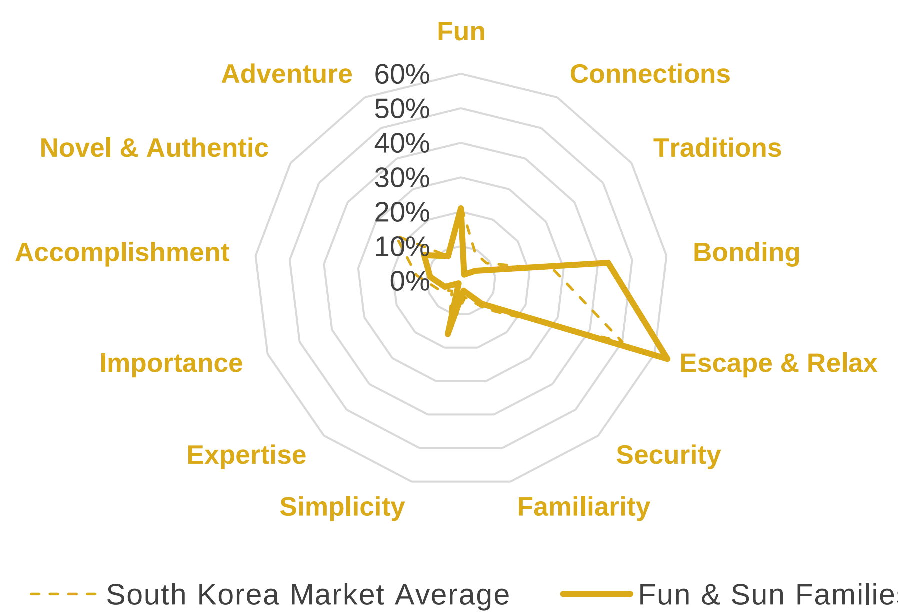
We cherish relaxation and shared family experiences in familiar, kid-friendly, and affordable destinations. We prioritize fun and simplicity over extravagance, gravitating towards well-known beaches and local spots with good communication standards.

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 ques 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.

53% 60 Have a valid passport

GENDER

49%	80	Male
51%	120	Female
0%		Non-binary / Other

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

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

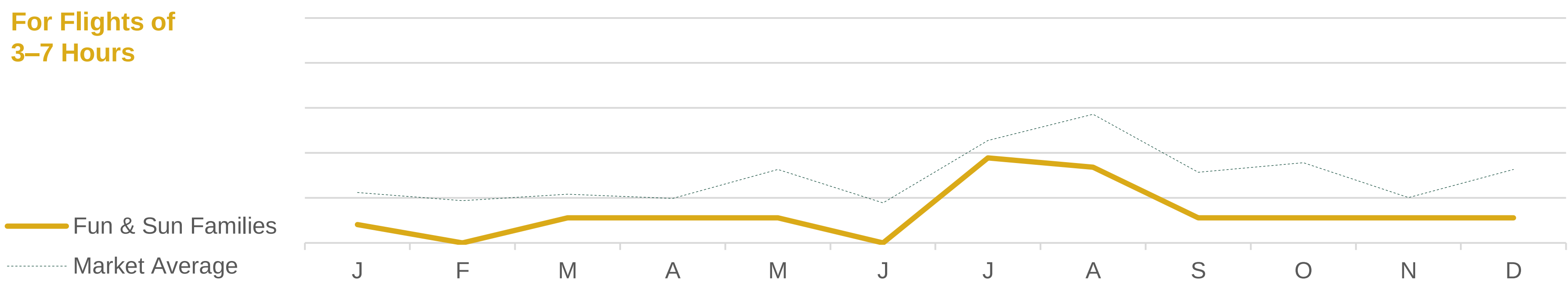
KEY terminology on this page

- **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

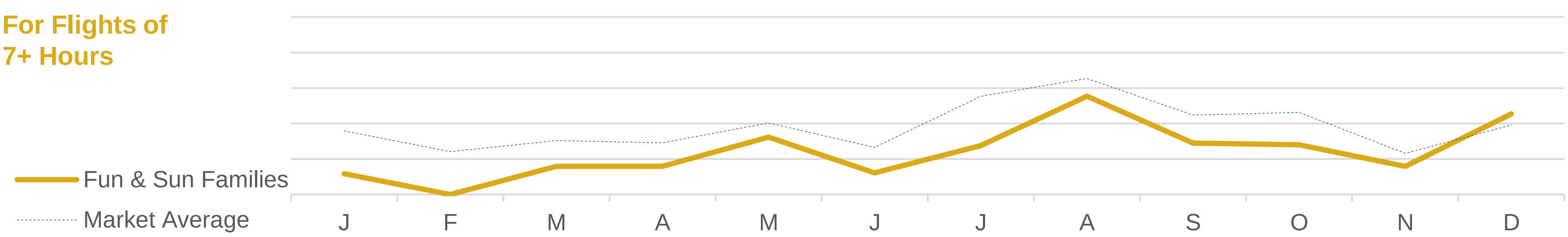
For additional definitions see Glossary

TYPICAL TRAVEL MONTHS

For Flights of 3–7 Hours



For Flights of 7+ Hours



TRIP DURATION

	%	INDEX
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
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	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

	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	
*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.	**4 MONTHS** BEFORE 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.
	3 MONTHS BEFORE MY TRIP	
	2 MONTHS BEFORE MY TRIP	
	1 MONTH BEFORE MY TRIP	
	MY TRIP BEGINS!	
	DURING MY TRIP	

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 – WHERE WE GO

OVERALL INSIGHT

- Our preferred destinations are affordable, kid-friendly, safe, and easy to access.
- We take shorter trips, under one week long, mostly domestic or to nearby countries.

WHERE WE ARE GOING LATELY

	SCORE	INDEX
South Korea	65%	144
Japan	10%	46
Vietnam	6%	67
Thailand	5%	117
Spain	3%	158

	SCORE	INDEX
US	3%	60
Guam	3%	161
Singapore	2%	88
France	2%	66
Philippines	1%	67

WHERE DO WE WANT TO GO

DESIRED DESTINATION FUNCTIONAL BENEFITS

	SCORE	INDEX
Is not too expensive	65%	125
Is kid-friendly	62%	144
Is easy to travel to	51%	123
Good connectivity (Wi-Fi, cell service, etc.)	46%	147
Is easy to travel around once there	43%	131
Provides a sense of personal safety	41%	123
Doesn’t take too long to get there	40%	133
Has adequate health standards	20%	129

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.

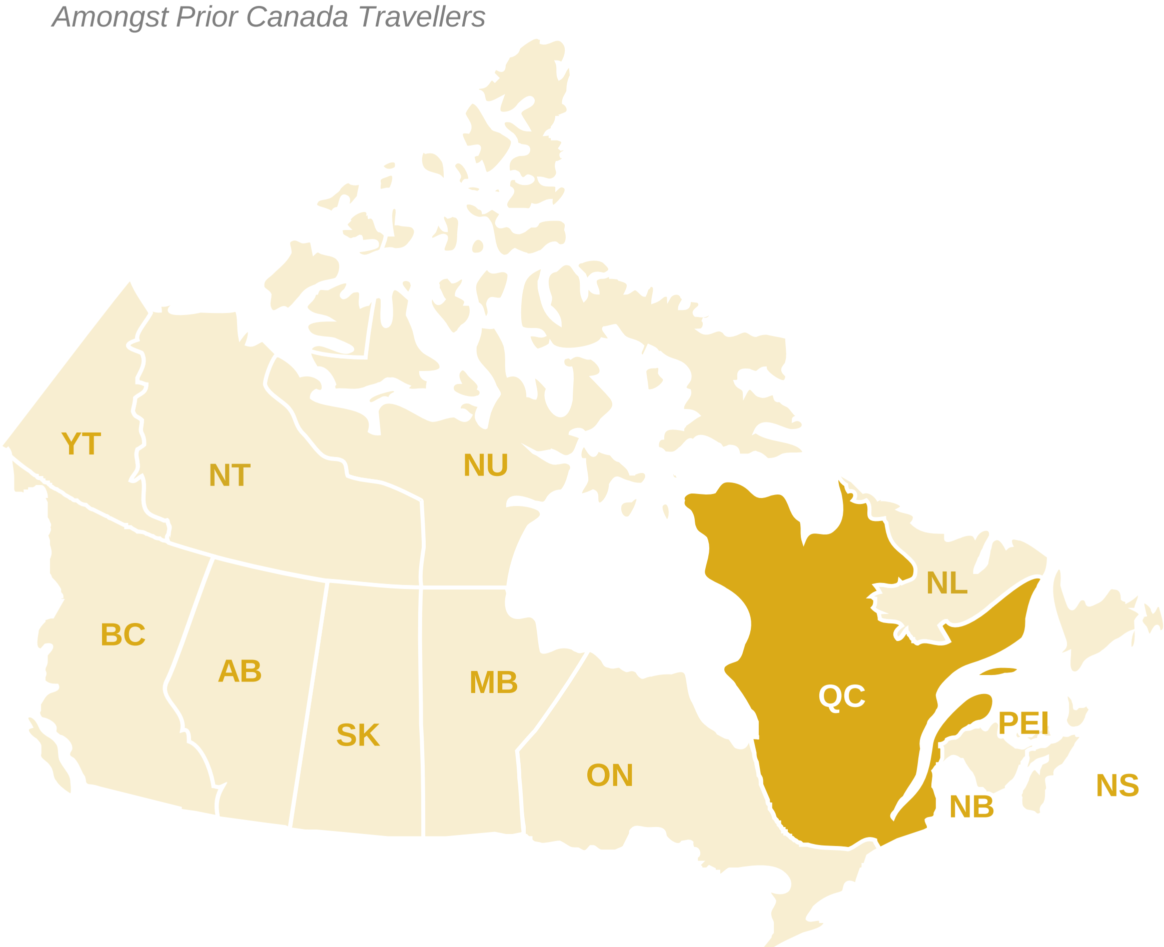
WHERE DO WE WANT TO GO IN CANADA

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.

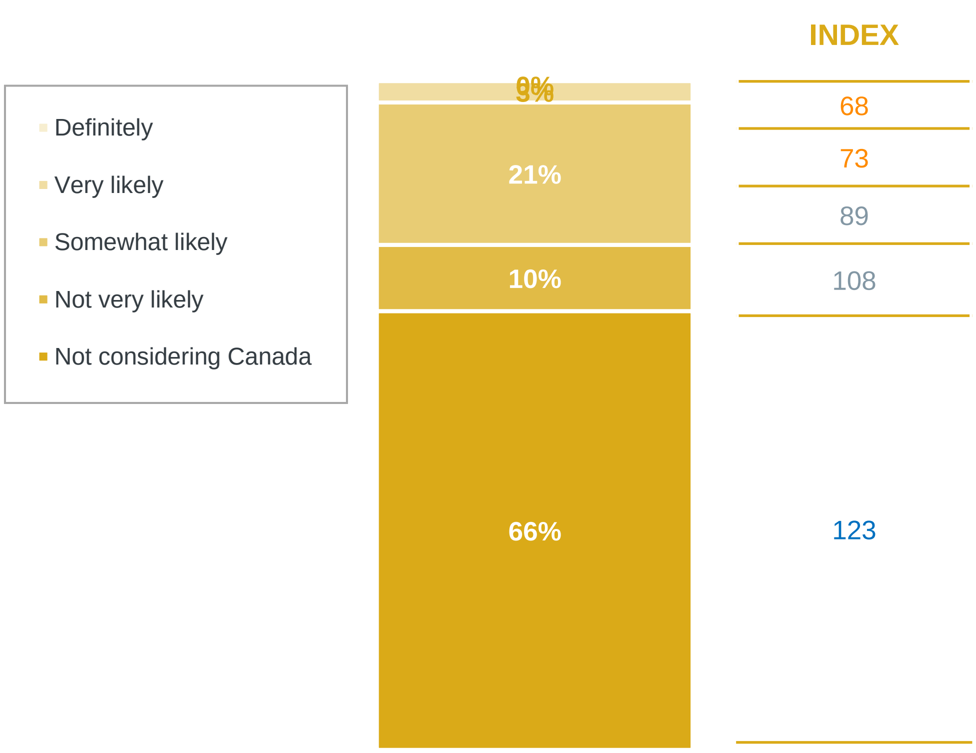
CANADA TRAVEL MONTHS ON A PAST TRIP

	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%

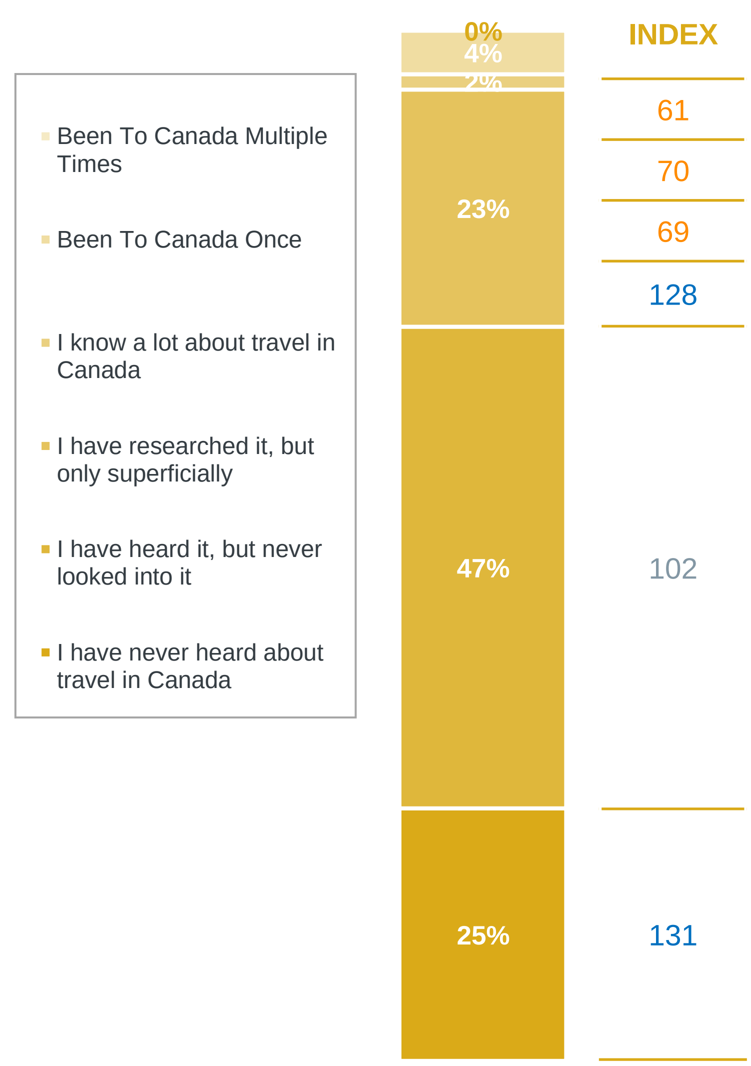
2% Been to Canada in last 5 years

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

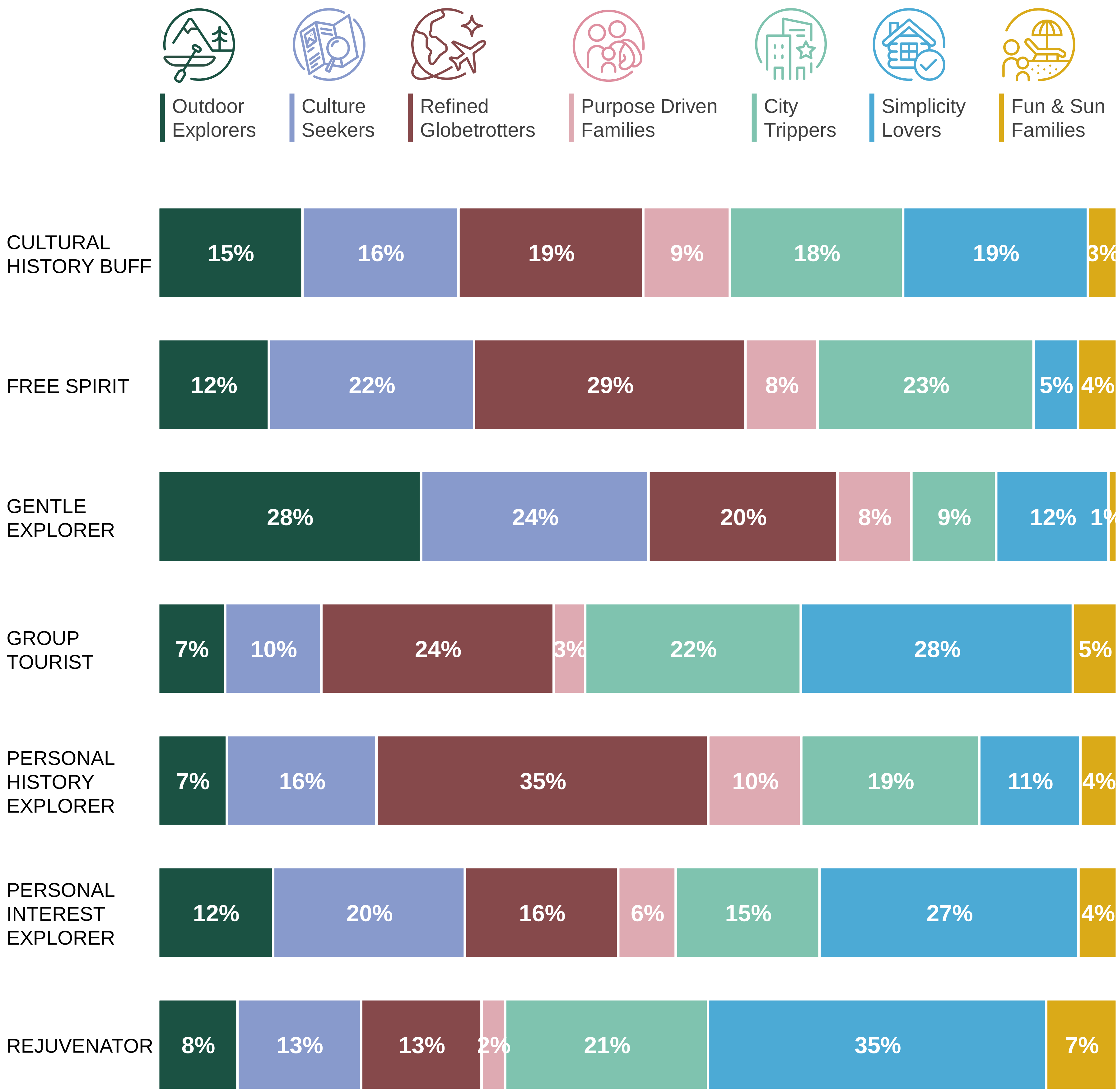
NON-ESSENTIAL SPENDING PRIORITIES

	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

DESIRED DESTINATION	How a traveller describes the personality of an ideal destination.	
DESTINATION CANADA PRIORITY SEGMENT	Traveller 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 maximize their impact.	
EMOTIONAL TRAVEL MOTIVATIONS	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	
EMOTIONAL TRAVEL MOTIVATION: **ACCOMPLISHMENT**	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.	*Statement(s) included in the motivation:* • *To feel like I've accomplished something.* • *To push my limits and challenge myself.*
EMOTIONAL TRAVEL MOTIVATION: **ADVENTURE**	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.	*Statement(s) included in the motivation:* • *To have experiences I am proud to tell others about.* • *To feel a sense of adventure.*
EMOTIONAL TRAVEL MOTIVATION: **BONDING**	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.	*Statement(s) included in the motivation:* • *To share quality time with others.* • *To bond and create lasting memories through shared experiences.*
EMOTIONAL TRAVEL MOTIVATION: **CONNECTIONS**	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.	*Statement(s) included in the motivation:* • *To feel connected with new people.*
EMOTIONAL TRAVEL MOTIVATION: **ESCAPE & RELAX**	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.	*Statement(s) included in the motivation:* • *To escape the demands of everyday life.* • *To find much-needed time to relax.* • *To let loose and forget about day-to-day life.*

GLOSSARY

DETAILS AND DEFINITIONS

EMOTIONAL TRAVEL MOTIVATION: **EXPERTISE**	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	*Statement(s) included in the motivation:* • *To feel like a travel expert.*
EMOTIONAL TRAVEL MOTIVATION: **FAMILIARITY**	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.	*Statement(s) included in the motivation:* • *To be familiar with my surroundings.* • *To feel like a local.*
EMOTIONAL TRAVEL MOTIVATION: **FUN**	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.	*Statement(s) included in the motivation:* • *To just enjoy myself and have fun.* • *To indulge myself and live in the moment.* • *To have a fun, social setting.*
EMOTIONAL TRAVEL MOTIVATION: **IMPORTANCE**	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.	*Statement(s) included in the motivation:* • *To feel like I'm important.*
EMOTIONAL TRAVEL MOTIVATION: **NOVEL & AUTHENTIC**	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 orgiginality in their journeys, immersing themselves in different cultures and engaging in genuine and authentic interactions.	*Statement(s) included in the motivation:* • *To have authentic experiences.* • *To open my mind to new perspectives.* • *To explore and discover new things and places.*
EMOTIONAL TRAVEL MOTIVATION: **SECURITY**	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.	*Statement(s) included in the motivation:* • *To feel welcomed.* • *To feel safe and secure.*

GLOSSARY

DETAILS AND DEFINITIONS

EMOTIONAL TRAVEL MOTIVATION: **SIMPLICITY**	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.	*Statement(s) included in the motivation:* • *To enjoy the simplicity of easy, straightforward travel.* • *To feel confident of no surprises; I'll get exactly what I expected.*
EMOTIONAL TRAVEL MOTIVATION: **TRADITIONS**	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.	*Statement(s) included in the motivation:* • *To create new, or take part in old, traditions.*
FUNCTIONAL BENEFITS	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	
NON-TRAVELLER	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.	
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.	
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.	
SEGMENT ALIGNMENT	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	
SHORT / MID / LONG HAUL	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	

GLOSSARY

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TRAVELLER ECONOMIC INDEX	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
TRAVELLER RESPONSIBLE INDEX	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, and diversity. To reduce market specific bias and any variation in score composition across markets, the score is reported as an index in the segment profiles
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 cover both overall preference and the specific makeup of their next planned trip
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).