

2024 GLOBAL TRAVELLER RESEARCH PROGRAM

SOUTH KOREA HIGHLIGHTS REPORT



Canada



Bay of Fundy New Brunswick





STUDY OVERVIEW: SOUTH KOREA MARKET



The Global Traveller Research Program is an annual survey commissioned by Destination Canada and conducted by YouGov Canada. The study fielded online in Korean, with sample being sourced from a nationally established panel.

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

HEG Audience Definition: Four segments that have been identified by Destination Canada as having higher economic and responsible values that most benefit Canadian communities.



Timing of Fieldwork

**November 19th –
December 11th 2024**



**Geographical Definition
for Qualified Trips**

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



Sample Distribution

Sample distribution:	National
Highly Engaged Guest (HEG) Audience:	951
Other travellers:	560
Total sample size:	1511

- In 2023, DC switched research providers to YouGov Canada, with the project being migrated over to YouGov’s proprietary panel.

Key Insights



Consideration for Canada as an international destination appears low among South Korean travellers, with next 2-year immediate potential for Canada being 8.4M



Potential visitors to Canada are more likely to consider a visit during the Fall months, followed by Spring



Travellers are interested in nature walks, trying local cuisine, and oceanside beaches



Travellers to Canada in the past 3 years were mostly on holiday trips, choosing Canada for factors such as the opportunity to relax, eco-friendly travel activities in the destination, and the destination being somewhere they always wanted to visit



South Korean travellers express that safety and comfort of the destination, authenticity, accessibility, and cultural significance would increase their interest in Indigenous cultural experiences

MARKET SIZING



Killarney Provincial Park
Ontario

MARKET SIZING – LONG-HAUL TRAVELLERS

Total Population 18+

44,644,000 (Total KR Population 18+)

42% Took a Long-Haul[^] Pleasure Trip in the Past 3 Years

36% Plan To Take a Long-Haul Pleasure Trip In Next 2 Years

18,750,500 (Recent Long-Haul Travellers)

16,072,000 (Upcoming Long-Haul Travellers)

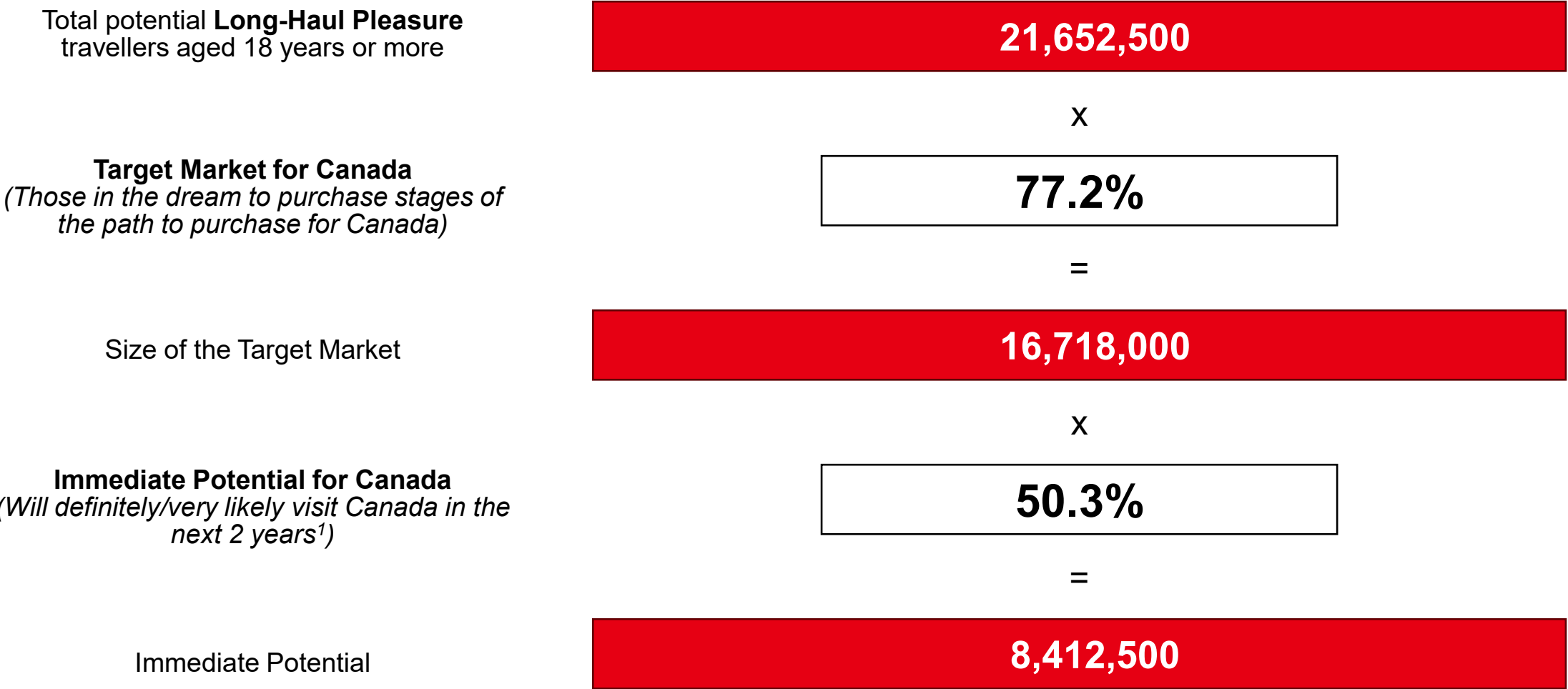
48.5% Incidence Rate

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

21,652,500 (Total Long-haul Travellers)

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

POTENTIAL MARKET SIZE FOR CANADA (NEXT 2 YEARS)



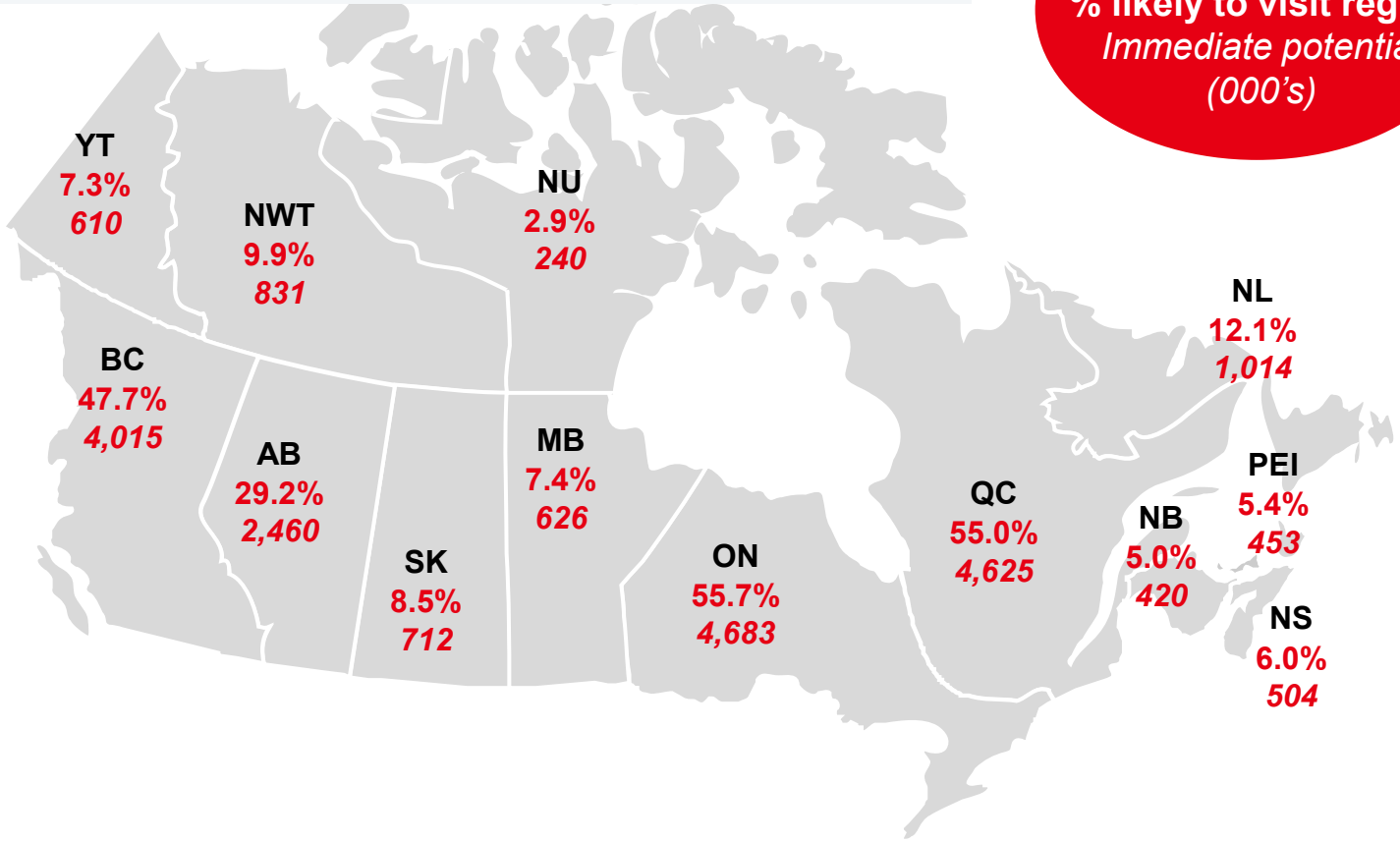
¹ Includes respondents likely to visit Canada for a trip of 1 to 3 nights, or a trip of 4 nights or more.
Base: Target market for Canada = long-haul pleasure travellers (past 3 years or next 2 years) (n=1511); Immediate potential for Canada = dream to purchase stages for P2P for Canada (n=1157)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip? (Select one for each)
E1. Realistically, how likely are you to take a holiday trip to Canada in the **next 2 years**? (Select one)

POTENTIAL MARKET SIZE BY REGION

Ontario and Quebec have the potential to draw in over 4.6 million South Korean travellers each over the next 2 years.

Immediate Potential for Canada: **8,412,500**

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



Base: Those in the dream to purchase stages of the path to purchase for Canada and definitely/very likely to take a trip to Canada (n=1157)
E2. If you were to take a holiday trip to Canada, in the next 2 years, which of the following Canadian provinces or territories are you likely to visit? (Select all that apply)



Nunavut

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

Province/Territory	Winter (Dec, Jan, Feb)	Spring (Mar, Apr, May)	Summer (Jun, Jul, Aug)	Fall (Sept, Oct, Nov)
British Columbia	9%	15%	14%	21%
Alberta	6%	11%	10%	13%
Saskatchewan	1%	5%	4%	3%
Manitoba	2%	3%	3%	2%
Ontario	9%	18%	16%	25%
Quebec	11%	16%	14%	27%
New Brunswick	1%	2%	3%	3%
Nova Scotia	1%	3%	3%	3%
Prince Edward Island	1%	3%	3%	2%
Newfoundland & Labrador	2%	4%	5%	5%
Yukon	2%	3%	3%	3%
Northwest Territories	2%	4%	2%	5%
Nunavut	1%	1%	1%	2%

Base: Those in the dream to purchase stages of the path to purchase for Canada & definitely/likely to take a trip to Canada (n=1157) E3a-m. During what time of year are you considering visiting [PROVINCE]? (Select all that apply)

South Korean travellers likely to visit Canada in the next 2 years have the strongest consideration for fall, followed by spring.



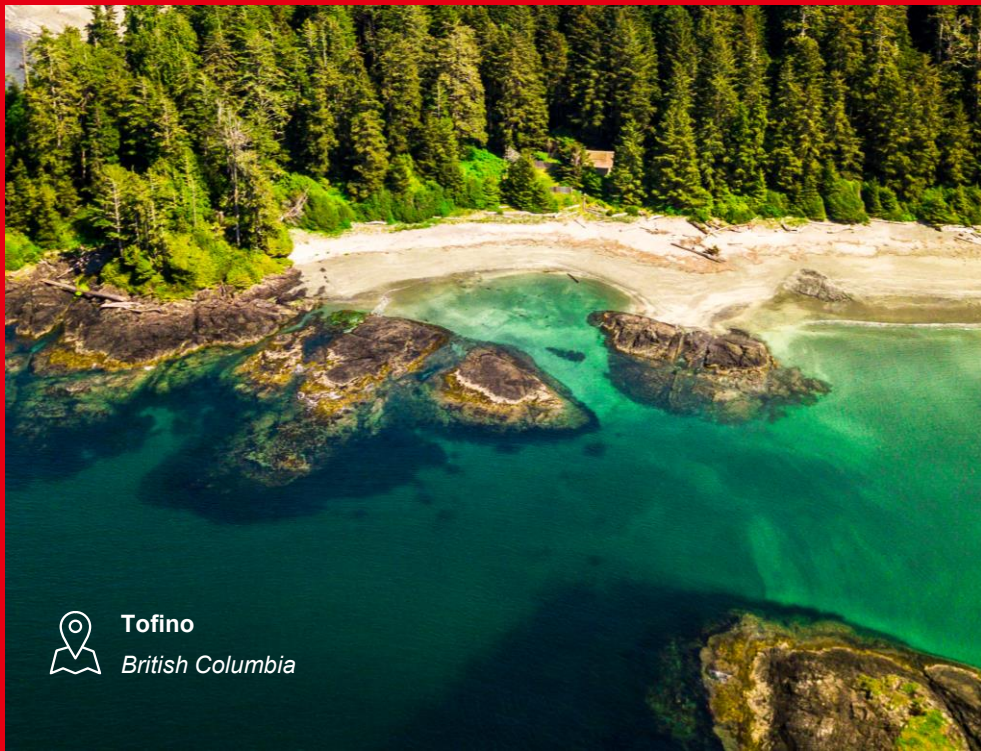
CANADA VS. COMPETITORS




Alberta

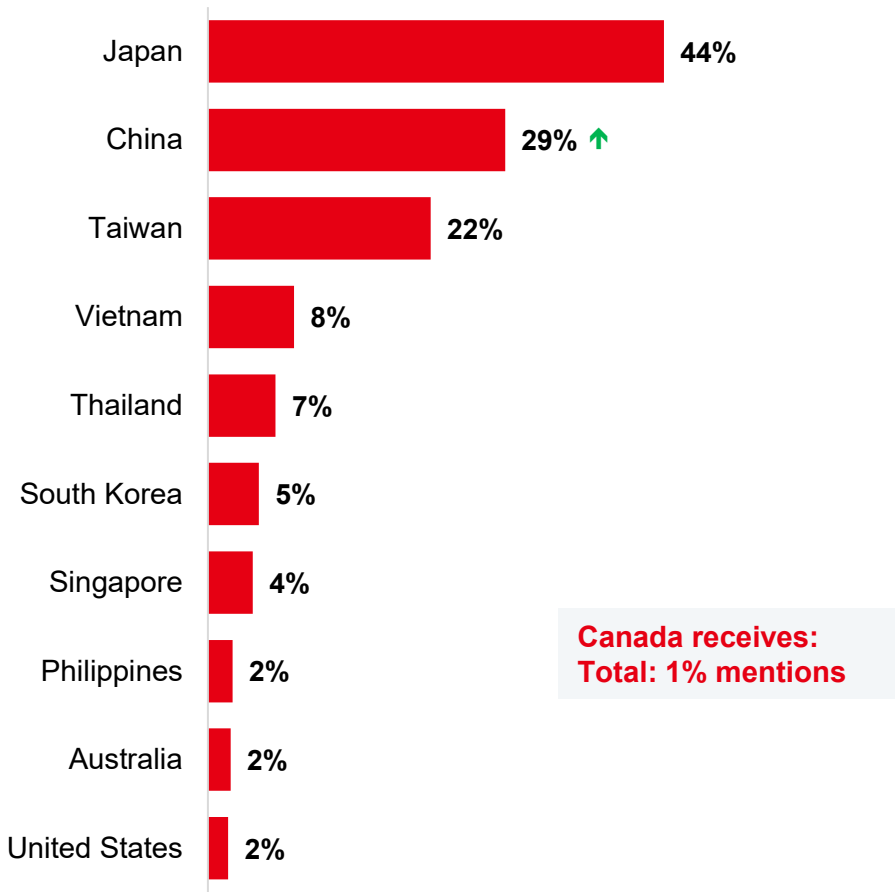


On an unaided basis, Canada is not a top destination that South Korean travellers are considering.



 **Tofino**
British Columbia

UNAIDED DESTINATION CONSIDERATION (NEXT 2 YEARS)¹



¹ Roll-up of brand mentions by country (e.g., percentage who said “Canada” or any destination in Canada).
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)
B1. You mentioned that you are likely to take long-haul holiday trip in the next 2 years. Which destinations are you seriously considering? (Please list up to 3 destinations)

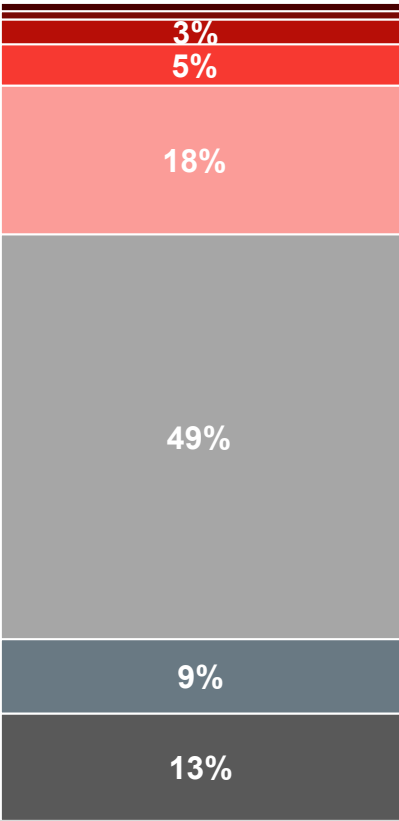
↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

South KoreaGTRP – December 2024



STAGE IN THE PURCHASE CYCLE FOR CANADA

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



Actively
Planning trip
to Canada
10%

One in ten South Korean travellers
are actively planning a trip to
Canada.

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

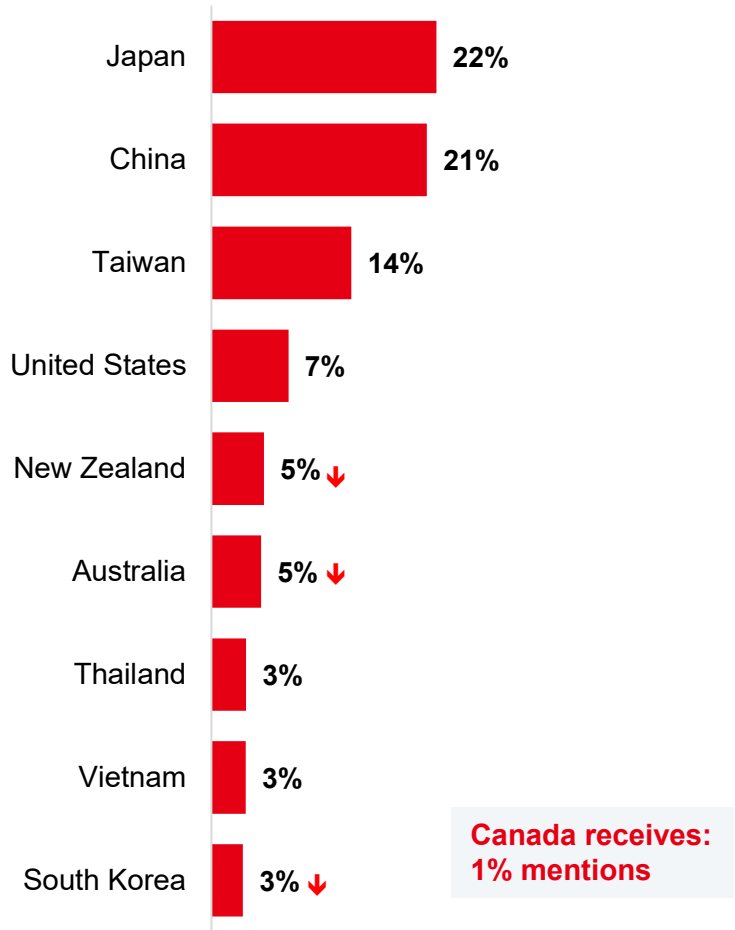
11 Note: all respondents evaluated Canada plus 3 randomly selected countries from the competitive set.
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Evaluated Canada (n=1511)
C1. Which of the following best describes your current situation when thinking about each of the following destinations for a holiday trip?
(Select one for each)

INDIGENOUS TRAVEL



Carcross
Yukon

UNAIDED INDIGENOUS DESTINATION



↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)

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



On an unaided basis, Canada receives low mentions as being an Indigenous tourism destination among South Korean travellers.

INTEREST IN INDIGENOUS DESTINATIONS

Over one half of South Korean travellers are interested in participating in Indigenous experiences in Canada, with over one in ten being very interested.

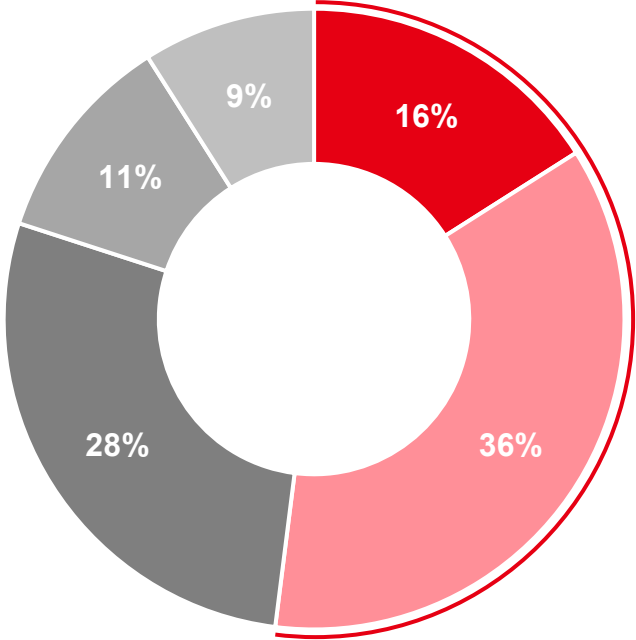
■ 5 - Very interested

■ 4

■ 3

■ 2

■ 1 - Not at all interested



4 or 5 (out of 5)
52%

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=770)
C10. As you may or may not know, Indigenous peoples are descendants of the original inhabitants of a country or region before people of different cultures or origins arrived. They have unique traditions and ways of life that are often distinct from the larger societies where they live. Indigenous tourism businesses are owned or operated by Indigenous people. How interested are you in participating in Indigenous cultural experiences and tourism activities in the following destinations?

FACTORS TO DRIVE INTEREST IN INDIGENOUS CULTURAL EXPERIENCES



South Korean travellers say that safety and comfort of the destination, authenticity of the experience, accessibility and ease of travel, and cultural significance and uniqueness would increase their interest in Indigenous cultural experiences.

Note: respondents were asked either about interest in Indigenous destinations (C10) or factors to drive interest in Indigenous cultural experiences (C11)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=741)
C11. What factors would increase your interest in participating in Indigenous cultural experiences and tourism activities in a destination? (Select up to 3)

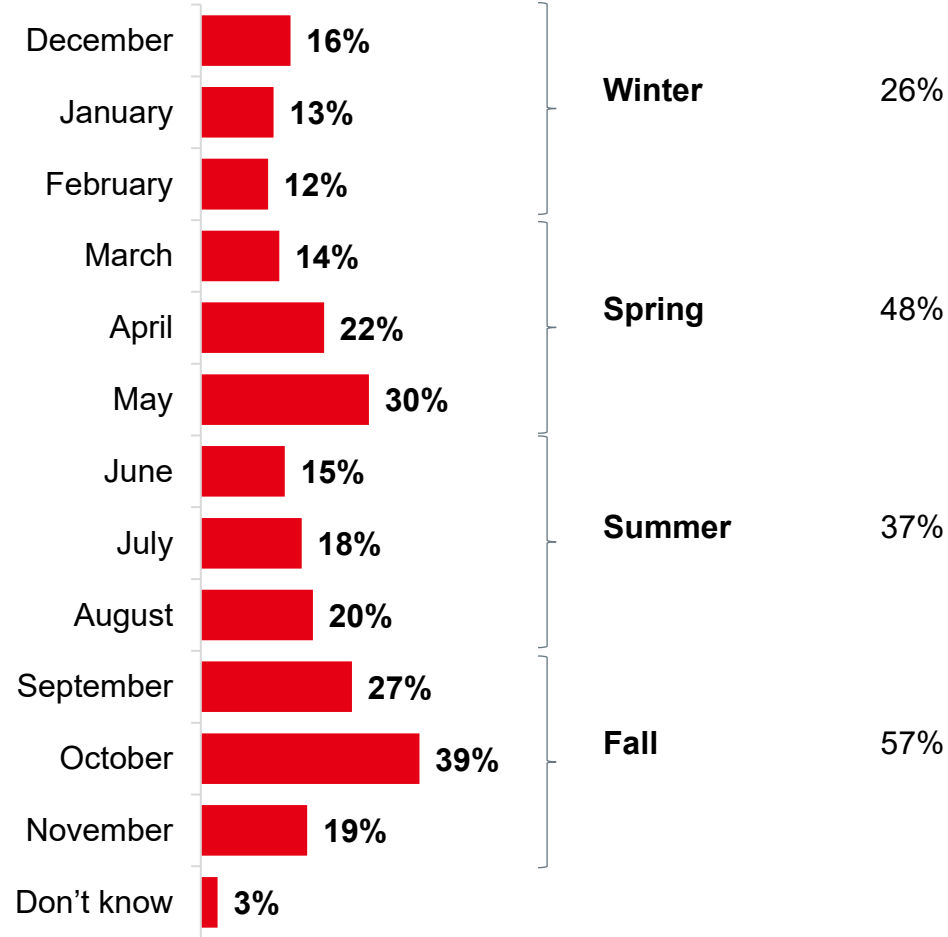
TRAVEL BEHAVIOURS



Montreal
Quebec



PREFERRED TIME OF YEAR FOR HOLIDAY TRIPS




Fall is the preferred time to take holiday trips, followed by spring, with the most popular months for holiday trips being October and May.

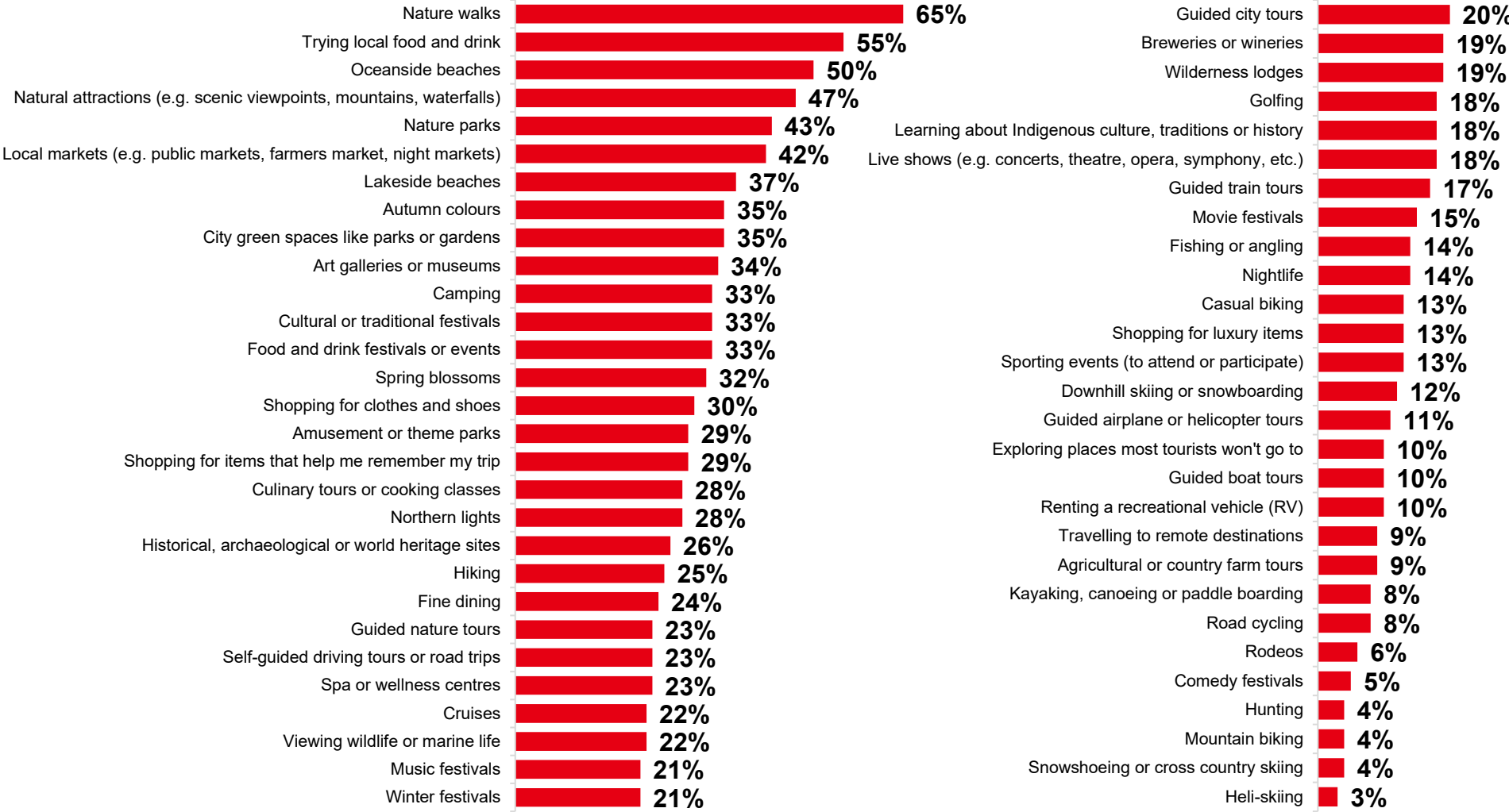


Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)
D1. In general, what time of year do you typically like to take holiday trips? Select all that apply

GENERAL ACTIVITIES INTERESTED IN (FULL LIST)

Top activities while on a holiday include nature walks, trying local cuisine, oceanside beaches, and natural attractions.

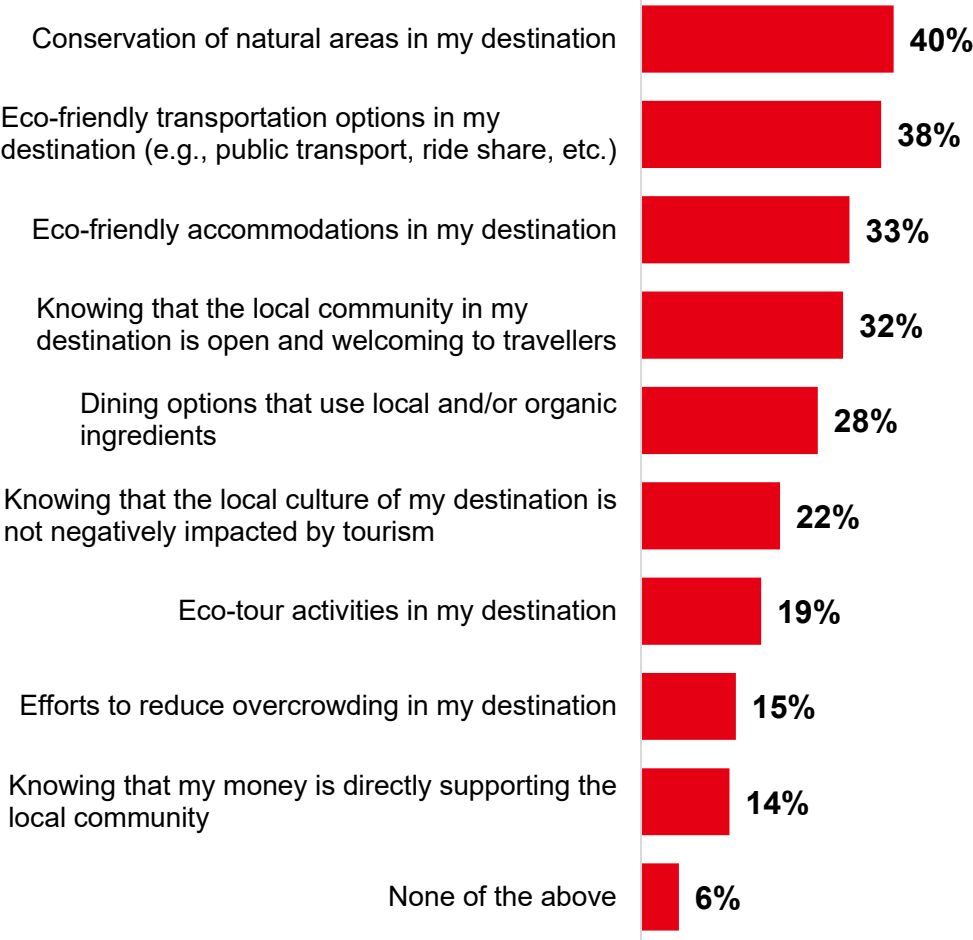
 Cup and Saucer Trail
Ontario



Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)
D4. In general, what activities or places are you interested in while on holiday? (Select all that apply)

TOP 3 MOST IMPORTANT SUSTAINABILITY EFFORTS

The most important sustainability efforts are conservation of natural areas in their destination, and eco-friendly transportation options.

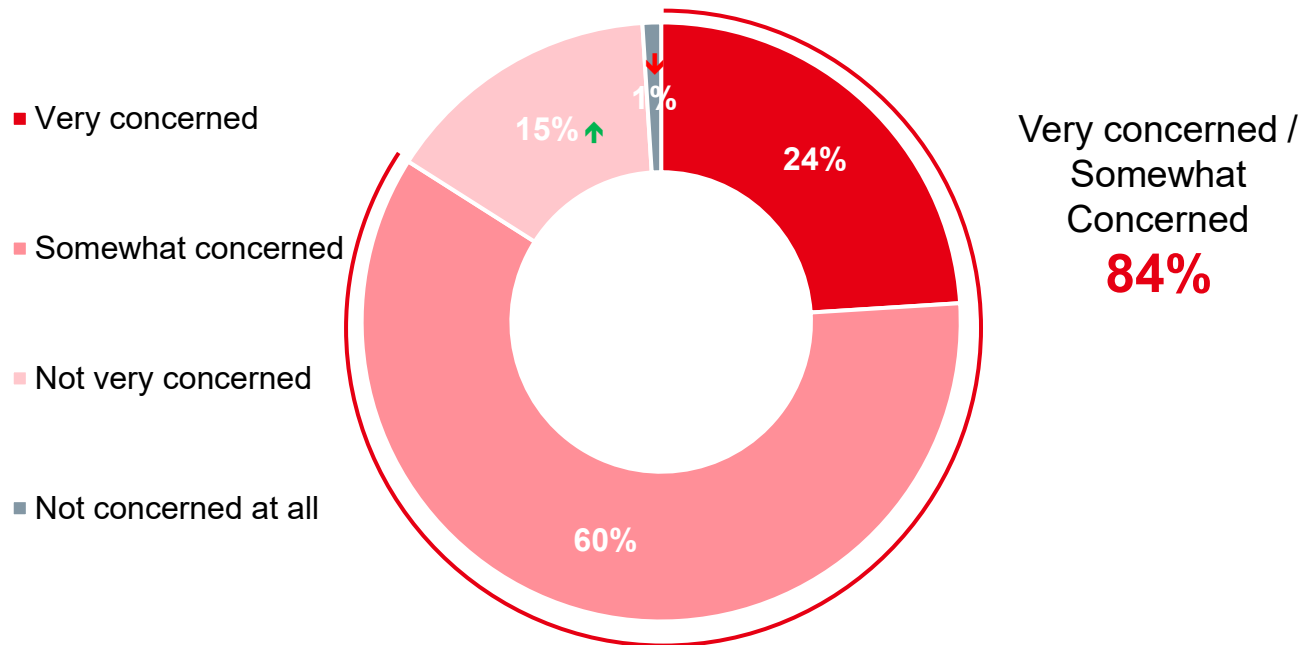


Sustainable Travel Description

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

Note: respondents were asked either about most important sustainability efforts (D8) or barriers to sustainable travel (D9)
Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=770)
D8. What are the top 3 sustainability efforts that are most important to you when selecting a holiday destination? Select up to three choices.

IMPACT OF EXTREME WEATHER EVENTS ON TRAVEL PLANS



80% state extreme weather events will **significantly or moderately impact** their future travel decisions in the next year

↑ / ↓ = significantly higher/lower result (2024 vs. 2023)

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=1511)

D10. As you may or may not be aware, extreme weather events are occurrences of unusually severe weather or climate conditions. They are often short-lived and include blizzards, heat waves, wildfires, tornadoes, hurricanes or tropical cyclones. How concerned are you about extreme weather events affecting your travel plans?

D15. To what extent do you expect extreme weather events to impact your future travel decisions in the next year?

Majority of South Korean travellers are concerned about extreme weather impacting their travel plans, with eight in ten stating that extreme weather will impact their future travel decisions.



Canadian Museum of Human Rights, Winnipeg
Manitoba

South Korea GTRP –
December 2024

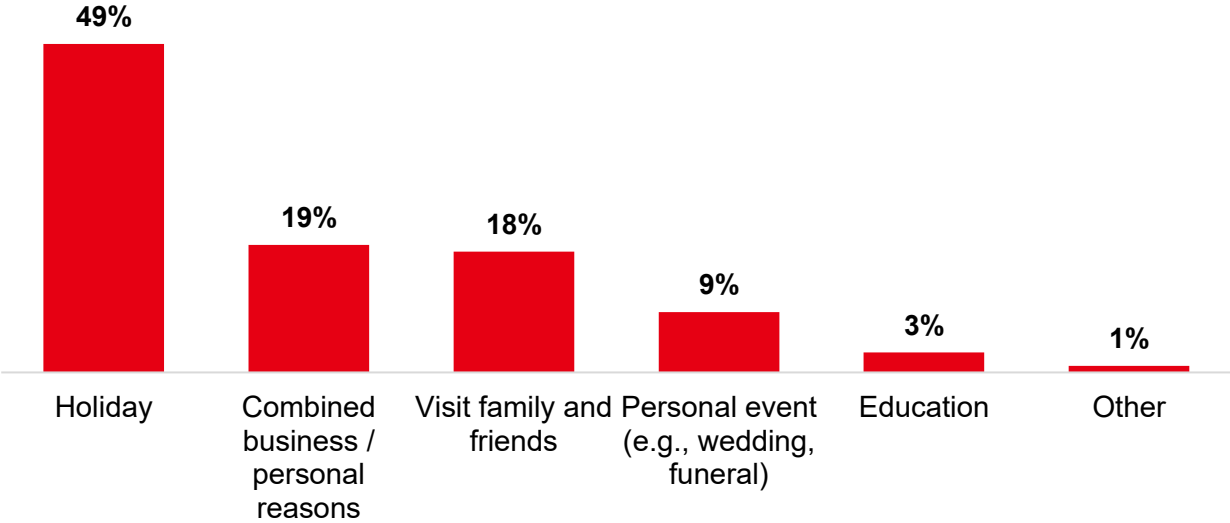


MOST RECENT TRIP



Le Pays de la Sagouine
New Brunswick

MAIN PURPOSE OF RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=102)
F2. What was the main purpose of this trip? (Select one)

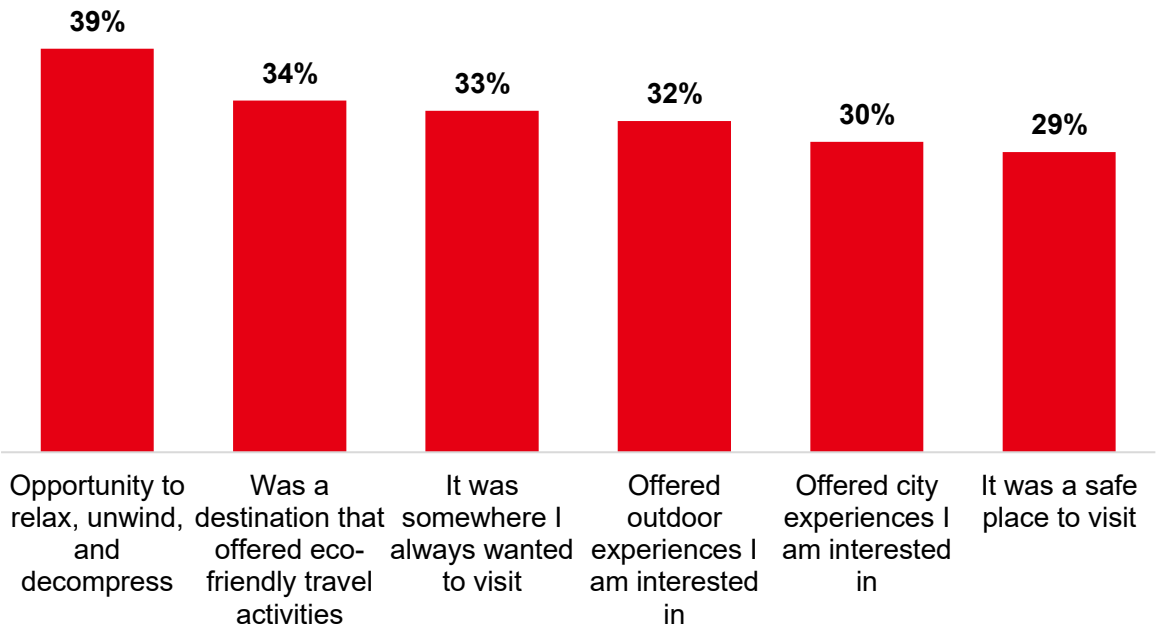
Nearly one half of South Korean travellers to Canada in the past three years were going on a holiday trip.



Nahanni National Park Reserves
Northwest Territories



FACTORS IN CHOOSING DESTINATION FOR RECENT TRIP (TOP 6)



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Took a holiday (n=51)
F3. Which of the following factored into your choice of destination for this trip? (Select all that apply)

The top factors for choosing to visit Canada for their most recent trip were the opportunity to relax, eco-friendly travel activities in the destination, and the destination being somewhere they always wanted to visit.

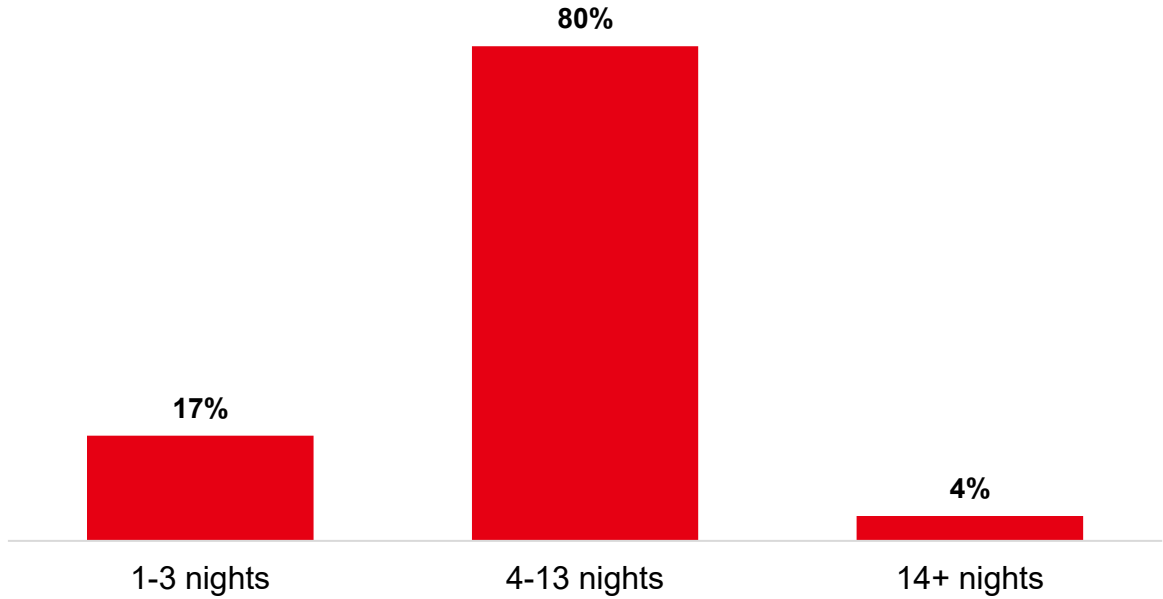


Fundy Trail Provincial Park
New Brunswick

South Korea GTRP –
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NIGHTS SPENT DURING RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=102)
F4. How many nights did you spend in this destination?

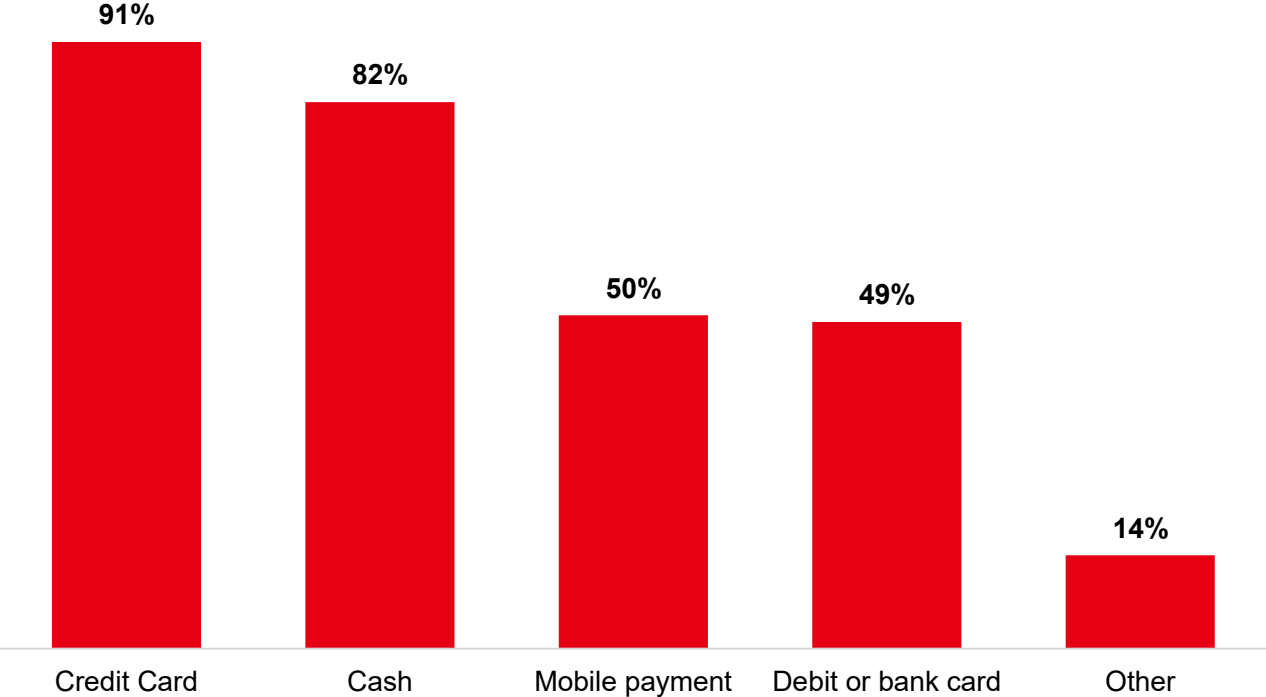
Eight in ten South Korean travellers to Canada stayed for 4-13 nights.



Barren Canyon, Algonquin Park
Ontario



PAYMENT METHODS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=102)
F8. Approximately what percentage of your purchases did you make during your trip with each of the following payment methods? Your best guess is fine. (Enter one number per row. Your total must add to 100%).



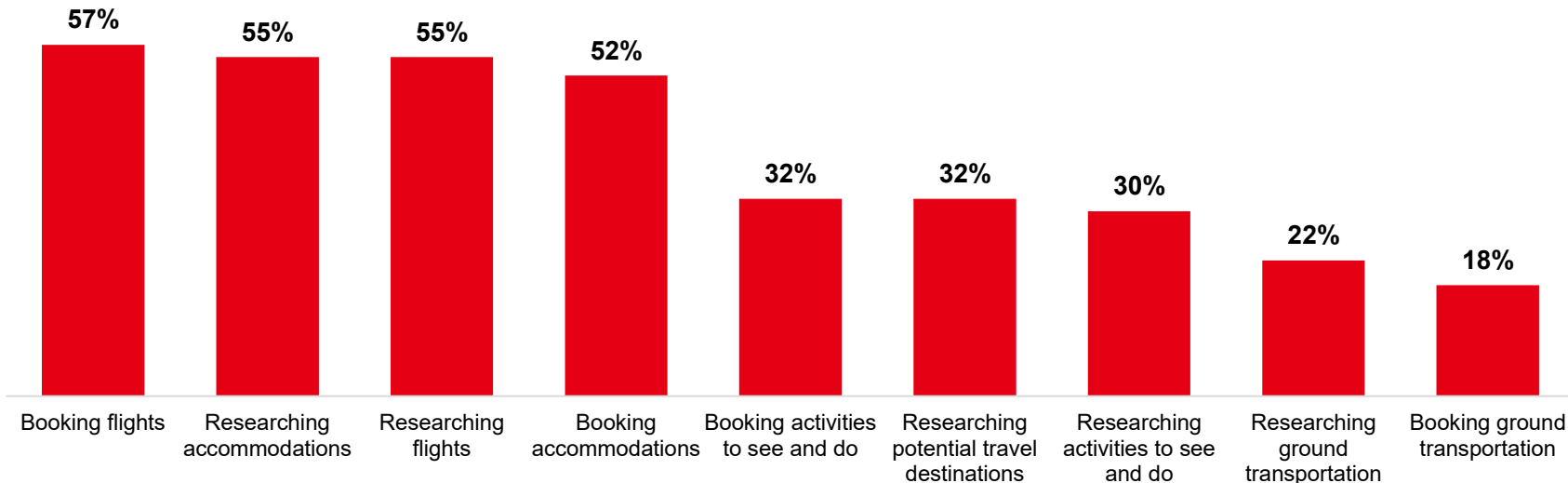
The most common payment method South Korean travellers used for their most recent trip to Canada was credit card, followed by cash.



TRAVEL AGENTS/TOUR OPERATOR USAGE FOR RECENT TRIP (AMONG THOSE WHO USED A TRAVEL AGENT/TOUR OPERATOR)

71% used a travel agent

Seven in ten recent travellers to Canada used a travel agent, most likely for booking flights, researching accommodations, and researching flights.



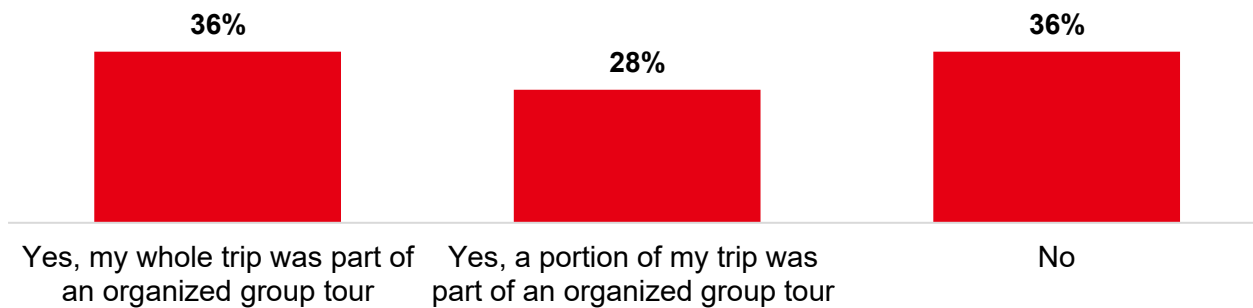
Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years, Used a Travel Agent/Tour Operator (n=72)
F9. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Trailfinders or Flight Centre, they do not include online booking engines like Expedia or Booking.com. Did you use a travel agent or tour operator to help you research or book your trip? (Select one)
F10. Which of the following did a travel agent or tour operator help you with?

United Kingdom GTRP –
December 2024

Twin Falls Lodge
Saskatchewan



ORGANIZED GROUP TOUR FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=102)
F11. An organized group tour consists of a package where any combination of accommodation, transportation, food and/or activities are included as a multi-day itinerary. Did you travel as a part of an organized group tour on this trip?

Over three in ten travellers to Canada in the past three years used an organized group tour for their whole trip, and another nearly three in ten used one for a portion of their trip.



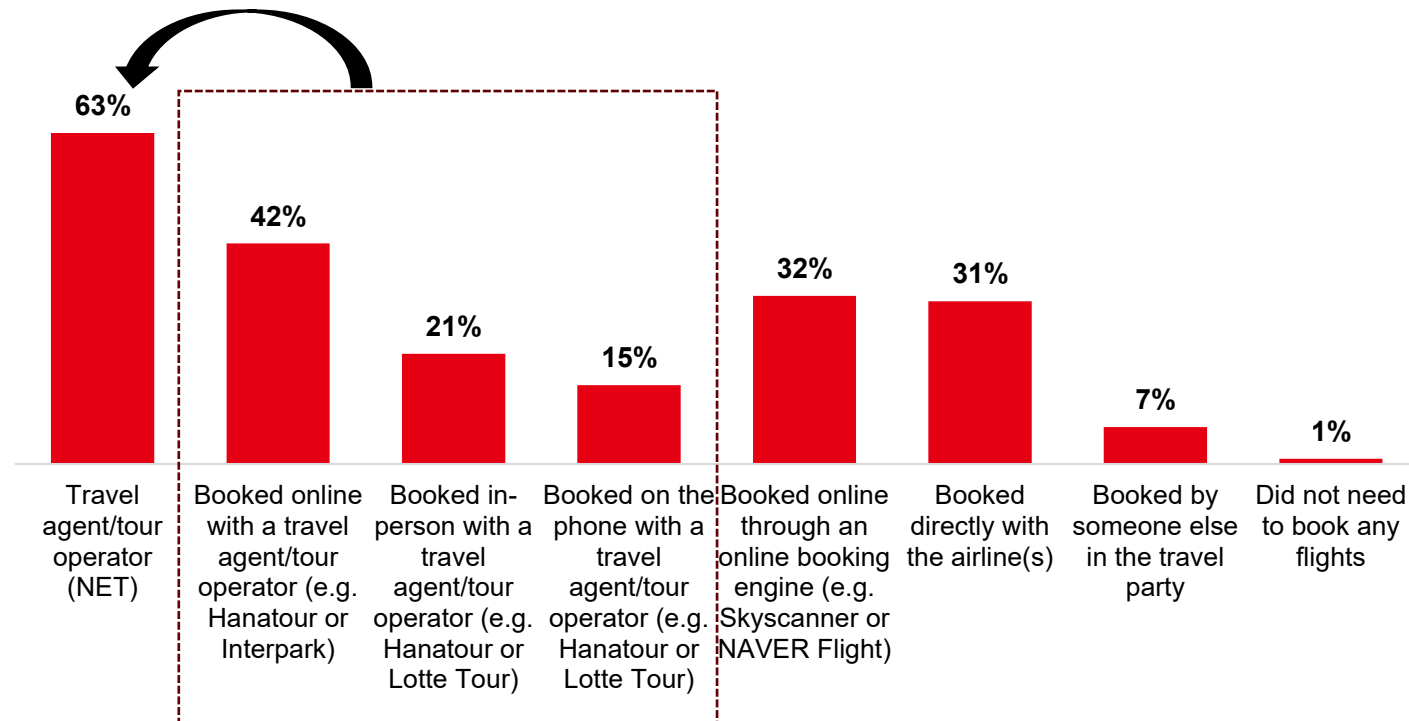
Saskatoon

Saskatchewan

South Korea GTRP –
December 2024



BOOKING FLIGHTS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to any destination past 3 years (n=102)
F12. How did you book your flight for this trip? (Select all that apply)

Recent travellers to Canada were most likely to have booked flights through a travel agent or tour operator.

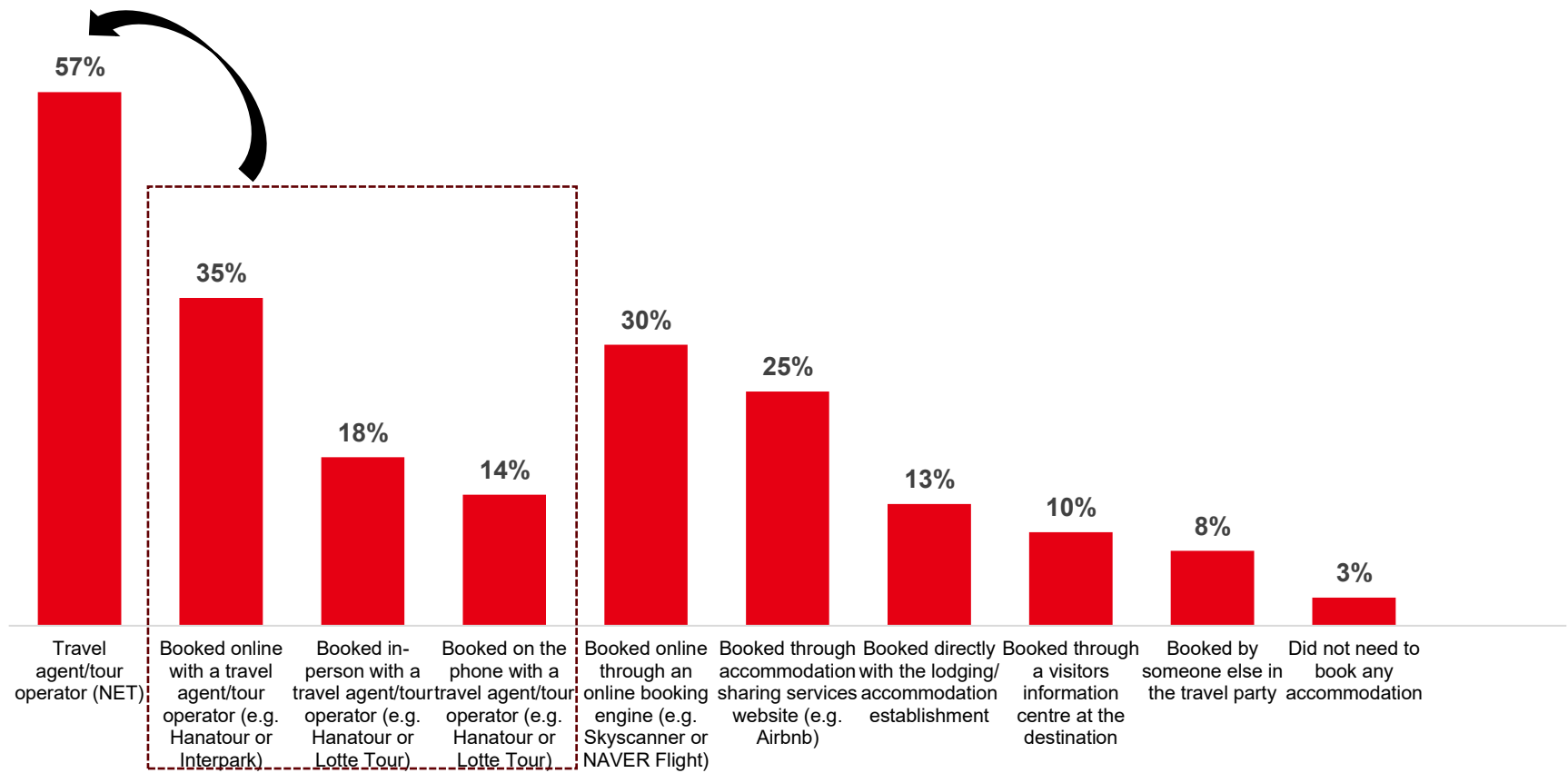


Montmorency Falls Park, Quebec City
Quebec

South Korea GTRP –
December 2024



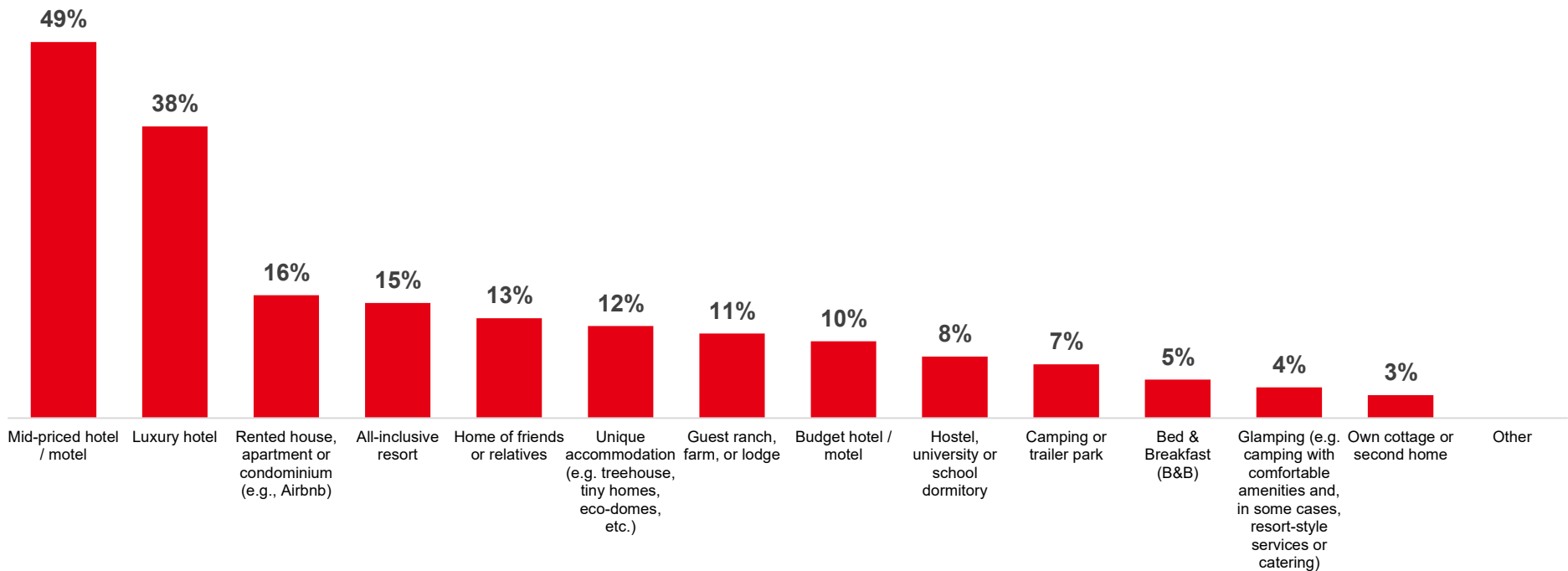
BOOKING ACCOMMODATIONS FOR RECENT TRIP



Booking through a travel agent or tour operator was also the most popular way to book accommodations.

Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years (n=102)
F13. How did you book your accommodation for this trip? (Select all that apply)

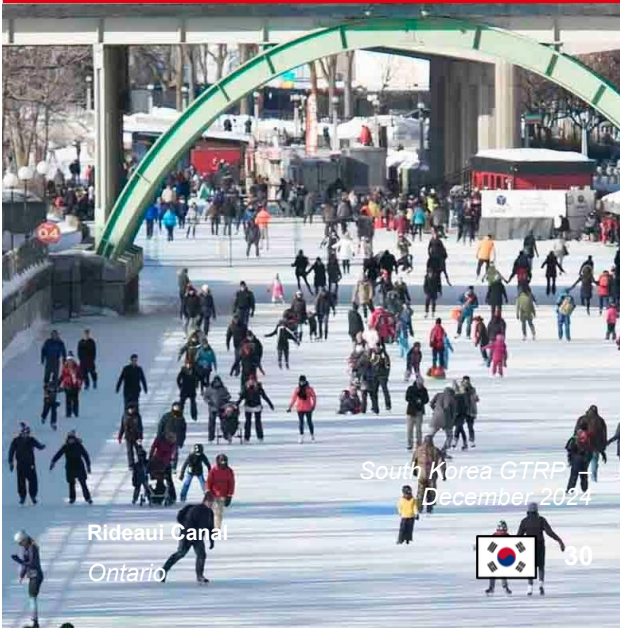
TYPE OF ACCOMMODATIONS FOR RECENT TRIP



Base: Long-haul pleasure travellers (past 3 years or next 2 years), Travelled to Canada past 3 years, Booked Accommodation (n=99)
F14. Which type of accommodation did you stay in during this trip? (Select all that apply)



Nearly one half of South Korean travellers that recently travelled to Canada stayed at a mid-priced hotel or motel.



THANK YOU

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

