South Korea Market Highlights – Facts at a Glance

More than 8 million South Korean long-haul pleasure travellers intend to visit Canada in the next two years.

2017 Performance

- **Arrivals**: 286K (↑17%)
- **Average Trip Spend**: $1,558

- This was supported by a 17% expansion in direct air capacity, boosted by the continuation of Air Canada’s service between Seoul and Toronto.

2018 Forecast

- **Visitor Forecast**: 299K (↑5%)
- **Spend Forecast**: $499M (↑5%)

Market Insights

- Pleasure and recreation travel to Canada grew more than any other trip purpose, up an estimated 51% over 2016.²

- 68% of South Koreans were solo travellers in Canada, more than any of our other target markets in 2016.²

- Interest in visiting Quebec has increased markedly year-on-year. Almost half of South Korean travellers also reported the Quebec City based TV drama series “Goblin” positively affected their desire to travel to Canada.⁵

Travel Seasons¹

% of arrivals to Canada by month

- **South Korea**
- **Destination Canada Market Average**

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<tr>
<th>Month</th>
<th>South Korea</th>
<th>Destination Canada Market Average</th>
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<tbody>
<tr>
<td>Jan</td>
<td>5%</td>
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<tr>
<td>Feb</td>
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<td>Dec</td>
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Market Potential

16,226,000
Canada’s target market

51%
are definitely/very likely to visit
Canada in the next 2 years

8,243,000
Canada’s immediate potential

Top Drivers

The main features that South Korean travellers desire in a destination are...

1. Proud to tell people I have visited
2. Beautiful outdoor scenery and landscapes
3. Cities have a lot of great attractions
4. Safe place to visit
5. Spend quality time with friends and/or family
6. Touring around to multiple destinations
7. Unique culture I want to experience on vacation
8. Intellectually stimulating travel experiences
9. Combines both outdoor activities and city experiences
10. Experience things that I can’t experience at home

Target Audiences

Free Spirits 25-34
They are shaped by the places they have visited and the unique things they have found. The cool experiences they have had in their travels defines them.

Key themes
Excite and inspire with unique and authentic experiences that will immerse them into trendy Canadian culture through inspiring content and abundant itineraries.

- Experiencing authentic Canadiana
  Experience distinctively Canadian products, personalities, and cuisine that can’t be found at home.

- Experiencing Canada’s natural beauty
  Feeling wowed by beautiful landscapes and scenery; exploring nature.

- Experiencing vibrant cities through intellectually stimulating experiences
  Experiencing urban icons interspersed with local, niche experiences.

Free Spirits 55+
They want to try a little bit of everything when they experience something new. They want to share that which brings them joy with their family and friends.

Key themes
Introduce high-end themed products reflecting trends appealing to this age group and their life stage (ie. Second honeymoon, girls-get-away) through key accounts.

- Unwinding in Canada
  Introducing all the ways travellers can unwind and pamper themselves in a uniquely Canadian way.

- Nature connected to cities
  Feeling wowed by beautiful landscapes and wildlife; while being stimulated by the culture and vibrancy of cities.

- Exploring regions, not singular destinations
  Touring multiple destinations through package tours connecting urban and outdoor adventure.

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